

Table 1.1

YESTERDAY READERSHIP OF A LOCAL DAILY NEWSPAPER
AMONG DEMOGRAPHIC GROUPS

	Market				
	Total	I	II	III	IV
<u>Total</u>	503	573	683	593	553
<u>By Sex:</u>					
Male	64	57	76	63	59
Female	55	57	59	55	50
<u>By Age:</u>					
18-34	46	37	53	52	38
35-54	63	67	72	60	51
55 or older	77	72	83	74	76
<u>By Income:</u>					
Under \$25,000	53	42	68	50	54
\$25,000-\$34,999	66	76	63	76	46
\$35,000+	71	74	66	73	68
<u>By People Contributing To Household Income:</u>					
One	62	58	71	63	59
Two or more	57	56	65	57	50
<u>By Education:</u>					
Less than HS grad	65	52	70	63	68
High school grad	51	54	56	37	54
1-3 years of college	55	49	79	57	41
College grad or more	72	71	77	80	60
<u>By Marital Status:</u>					
Married	63	64	68	62	57
Divorced/widowed/ separated	65	64	78	59	59
Never married	47	35	57	53	44
<u>By Household Size:</u>					
One	61	47	86	69	51
Two	66	62	77	62	64
Three or more	54	57	55	54	49
<u>By Length Of Residence In Area:</u>					
9 years or less	51	45	64	55	42
10+ years/entire life	64	64	69	63	61

Question: "When was the last time you read or looked at a morning/
afternoon copy of the weekday (NAME OF LOCAL DAILY
NEWSPAPER)?"

Frequent Readership of the Local Daily Newspaper

Almost three-fifths (58%) of all adults read four or all five Monday-through-Friday editions of their local daily newspaper (see Table 1.2).^{*} People who were more likely to have read a local daily yesterday—males, college graduates, older (55+), upper-income (\$35,000+) adults—are also more likely to have read it regularly in the preceding week.

Past Week Readership

Table 1.3 presents the past week's reach of the local print media in the four markets. Four-fifths (80%) of adults in these four markets read a local daily newspaper at least once in the past week. Past week's readership of dailies in the four markets ranged from 74 percent to 88 percent.

Three-fourths (76%) of adults in the four markets read last week's Sunday newspaper; the net daily or Sunday readership was 89%. Again, there were important market-to-market variations in both past week Sunday readership (71%-82%) and in net daily or Sunday readership (85%-96%).

* Frequent reader = Read four or all five issues of a local daily paper in the preceding week. Questions: "Other than yesterday, which you've already told me about, I'd like you to tell me whether you, yourself, have read or looked into a copy of the weekday (NAME OF LOCAL DAILY PAPER) within the past seven days. Let's start with a week ago today — that is, last (DAY OF INTERVIEW). Did you read a weekday copy of the (NAME OF LOCAL DAILY PAPER) on (DAY OF WEEK)?" (GO THROUGH EACH DAY OF THE WEEK EXCEPT YESTERDAY.)

Table 1.2

FREQUENT READERSHIP OF A LOCAL DAILY NEWSPAPER
AMONG DEMOGRAPHIC GROUPS

	Total	Market			
		I	II	III	IV
<u>Total</u>	58½	56½	66½	55½	54½
<u>By Sex:</u>					
Male	62	56	74	61	57
Female	53	56	58	49	50
<u>By Age:</u>					
18-34	40	35	46	42	35
35-54	66	66	82	63	56
55 or older	73	72	77	72	71
<u>By Income:</u>					
Under \$25,000	50	37	65	49	48
\$25,000-\$34,999	64	76	63	64	54
\$35,000+	72	74	71	73	68
<u>By People Contributing To Household Income:</u>					
One	59	60	68	55	55
Two or more	56	54	64	54	52
<u>By Education:</u>					
Less than HS grad	61	48	70	50	68
High school grad	51	55	57	37	53
1-3 years of college	48	49	70	46	32
College grad or more	73	69	77	80	65
<u>By Marital Status:</u>					
Married	61	63	67	58	57
Divorced/widowed/ separated	64	64	72	63	56
Never married	44	35	57	43	41
<u>By Household Size:</u>					
One	57	44	82	62	49
Two	63	62	71	60	61
Three or more	53	55	57	49	50
<u>By Length Of Residence In Area:</u>					
9 years or less	48	45	60	49	37
10+ years/entire life	63	62	68	59	62

Table 1.3

PAST WEEK READERSHIP
OF LOCAL PRINT MEDIA

	Market				
	Total	I	II	III	IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
<u>Past Week Readership Of:</u>					
Local daily newspaper	80%	77%	88%	81%	74%
Sunday newspaper	76	71	82	73	77
<u>Read Paid Or Free Weekly</u>					
Paid weekly	14	19	21	4	12
Free weekly	57	43	59	58	68
Both paid and free weeklies	9	8	18	2	8
Local Daily or Sunday Newspaper (Net)	89%	85%	96%	89%	87%

Questions: "Not counting today, have you read or looked at a local paid weekly newspaper since last (DAY OF INTERVIEW)? I mean a local newspaper printed once a week that you have to pay for?"

"Now, I would like to ask you about free weekly newspapers. This could be a newspaper, shopper or 'pennysaver' that is delivered free to your home or that you can just pick up free at stores, supermarkets, and so on. For the purpose of these question, we're not going to be asking about (NAME OF TMC PRODUCT), the free newspaper that was mentioned before. First of all, not counting today, have you read or looked at a free weekly paper since last (DAY OF INTERVIEW)?"

"Did you read or look into any part of this past Sunday's (NAME OF LOCAL SUNDAY PAPER)?"

The paid weekly readership figure across the four markets is significantly different from that for free weeklies (14% vs. 57%, respectively). This divergence is partly due to the selection criteria, which focused on papers in markets with strong competition from free weeklies. It may also reflect the competitive success achieved by the local TMC products published by the newspaper in each of the four markets.

The local reach of paid weeklies ranged from only 4 percent to 21 percent. The free weeklies' reach ranged from 43 percent (Market I) to 68 percent (Market IV).

Almost one-half (46%) of all adults across the four markets read at least one issue of the local daily newspaper and a free weekly in the past week (see Table 1.4). Three times as many adults read at least one issue of a daily newspaper but not a free weekly in the past week than read a free weekly but not a daily newspaper (34 % and 11%, respectively). The remaining 9 percent were not reached by either medium in the past week.

Duplicated readership between the local daily newspaper and a free weekly paper averaged 81 percent in the four markets, with all four having at least a 71 percent overlap in readership of these two media. The same conclusion holds, in varying degree, for all of these markets: advertising in nondailies adds little to the reach achieved by the local daily alone.

Table 1.4

DUPLICATED READERSHIP BETWEEN
DAILY NEWSPAPERS AND FREE WEEKLIES

	Total	Market			
		I	II	III	IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
<u>Read In Past Week:</u>					
Daily and free weekly	46%	30%	52%	49%	52%
Daily but not free weekly	34	47	36	32	22
Free weekly but not daily	11	13	7	9	16
Neither	9	11	6	10	11
Duplicated readership between local daily paper and <u>free</u> weekly (46%/57%)					
	81%	71%	88%	84%	77%

Who Reads Dailies and Free Weekly Papers?

Consistent with previous research,* older (55+ years old), upper-income (\$35,000 and over), college-educated, and more stable residents (10+ years living in the area) were all more likely than their counterparts to have read a daily and a Sunday newspaper in the past week (see Table 1.5 and also Appendix Table A.2).

* See "Newspapers In American News Habits: A Comparative Assessment" (Newspaper Advertising Bureau, 1985) and "The Daily Diet Of News: Patterns Of Exposure To News In The Mass Media" (Newspaper Advertising Bureau, 1978).

Table 1.5

PAST WEEK READERSHIP OF LOCAL PRINT MEDIA
AMONG DEMOGRAPHIC GROUPS

	Local	Sunday Paper	Free Weekly	Daily + Free Weekly	Paid Weekly	Uniquely Reached By:	
	Daily Paper					Local Daily	Free Weekly
Total	80½	76½	57½	46½	14½	34½	11½
By Sex:							
Male	81	78	56	47	13	34	9
Female	79	74	57	45	14	34	13
By Age:							
18-34	72	68	56	41	12	31	15
35-54	81	78	60	50	15	32	11
55 or older	90	82	54	49	14	41	5
By Income:							
Under \$25,000	77	71	58	45	12	33	13
\$25,000-\$34,999	82	77	56	45	15	37	11
\$35,000+	86	88	58	52	17	37	6
By People Contributing To Household Income:							
One	80	73	57	46	12	34	11
Two or more	80	77	57	46	15	34	11
By Education:							
Less than 12 grad	79	74	59	45	20	33	13
High school grad	77	71	57	46	12	32	12
1-3 years of college	78	75	60	47	15	31	13
College grad or more	85	82	53	46	13	40	7
By Marital Status:							
Married	81	78	60	49	15	32	11
Divorced/widowed/ separated	83	74	55	46	9	37	9
Never married	74	71	50	37	15	36	13
By Household Size:							
One	76	56	57	44	14	32	14
Two	84	80	56	48	12	36	7
Three or more	78	75	57	44	15	34	13
By Length Of Residence In Area:							
9 years or less	72	68	58	41	11	31	17
10+ years/entire life	84	80	56	48	15	36	9

Competition From Free Weeklies

Readership levels of free weeklies varied across the four markets, as did the numbers of free weeklies that compete with the local daily newspapers in their home counties. In Markets III and IV, only one free weekly competes with the local daily: 53 percent and 65 percent of all adults, respectively, read these free weeklies specifically in the past week (see Table 1.6). (In Markets III and IV, a small proportion of adults read some other free weekly during the past week.) In Market I, a highly fragmented set of free weeklies competes with the local daily paper: none has a readership as high as 20 percent, and there are another six which were read by only 1 or 2 percent of the adults in the daily paper's home county. In Market II, there are four free weeklies, each of which was read by between 10 and 19 percent of the adults in that market's home county.

Table 1.6

STRUCTURE OF FREE WEEKLIES' COMPETITION WITH DAILY NEWSPAPERS

	Market			
	I	II	III	IV
Base: Total Respondents	(200)	(200)	(200)	(200)
<u>Read A Free Weekly</u>	<u>43%</u>	<u>59%</u>	<u>58%</u>	<u>68%</u>
<u>Free Weekly With:</u>				
Highest readership	18%	19%	53%	65%
2nd highest readership	11	18		
3rd highest readership	7	14		
4th highest readership		10		

Home Delivery

This study also examined home delivery of daily and Sunday newspapers and free and paid weeklies. Table 1.7 presents the results in each of the four markets, for these four print media.

Three-fifths of households had a daily newspaper or a Sunday paper delivered to their homes (59% and 60%, respectively), somewhat lower than the 66 percent of households that got home delivery of a free weekly. As expected, the local daily newspapers in these markets confront substantial competition from free weeklies: in three markets home delivery of free weeklies actually exceeded those of the local daily. There were wide variations in households getting home delivery of a free weekly, ranging from 46 percent in Market I to 78 percent in Market IV.

The preponderance (78%) of yesterday readers of local daily newspapers had that copy delivered to their homes. This group constituted 46 percent of the adult population. An additional 13 percent of the respondents did not read a local daily yesterday but belonged to households which did get home delivery of that paper.

Home delivery of free weeklies exceeded their readership: although the four-market average for home delivery of free weeklies was 66 percent, only 57 percent of all adults read the issue of that free weekly. By way

Table 1.7

HOME DELIVERY OF LOCAL PAPERS

	Total	Market			
		I	II	III	IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
Family Gets Home Delivery Of:					
Local daily newspaper	59%	61%	65%	59%	53%
Sunday newspaper	60	63	63	61	52
Paid weekly	15	19	19	7	15
Free weekly	66	46	69	72	78
Base: Read A Daily News- paper yesterday					
	(476)	(114)	(135)	(118)	(109)
Copy of local daily read yesterday was home delivered					
	78%	81%	76%	81%	74%

Questions: "When was the last time you read or looked into a weekday copy of the weekday morning/afternoon (NAME OF LOCAL DAILY)?"

(IF READ YESTERDAY) "Was the copy of the morning/afternoon (NAME OF LOCAL DAILY) you read yesterday delivered to your home, bought outside your home, or did you get it some other way?"

(IF NOT READ YESTERDAY) "Do you or your family get home delivery of the weekday morning/afternoon (NAME OF LOCAL DAILY)?"

"What about Sunday editions? Do you or your family get home delivery of the (NAME OF LOCAL SUNDAY PAPER)?"

(IF NAMED A PAID WEEKLY READ IN PAST WEEK) "Are any of these paid weekly papers that you read delivered to your home or apartment because you or someone in your household subscribes?"

(IF DID NOT READ A PAID WEEKLY IN PAST WEEK) "Are any paid weekly papers delivered to your home or apartment because you or someone else in your apartment has a paid subscription?"

"Are any free weekly newspapers delivered to your home or apartment?"

of contrast, past week readership of daily newspapers (80%) was substantially higher than the four-market average for home delivery (59%).

People who were more likely to read each type of local paper—those who have lived in the area for at least ten years, college graduates, older (55+), and upper-income (\$35,000+) adults—were generally more likely to get home delivery of them (see Table 1.8 and also Appendix Table A.3). Men were more likely than women to subscribe to the local daily and Sunday newspapers, but women were more likely than men to live in households that got home delivery of a free weekly.

Although upper-income (\$35,000+) respondents were more likely than their counterparts to get home delivery of free weeklies, the former are no more likely than the latter to have read that free weekly. Therefore, the distribution pattern of free weeklies appears to be more attractive than is their actual readership, in demographic terms.

Table 1.8

HU E DELIVERY OF LOCAL PRINT MEDIA
AMONG DEMOGRAPHIC GROUPS

	<u>Local Daily Paper</u>	<u>Sunday Paper</u>	<u>Paid Weekly</u>	<u>Free Weekly</u>
<u>Total</u>	<u>59½</u>	<u>60½</u>	<u>15½</u>	<u>66½</u>
<u>By Sex:</u>				
Male	62	62	14	63
Female	57	57	15	69
<u>By Age:</u>				
18-34	46	51	13	67
35-54	63	61	15	68
55 or older	75	70	17	61
<u>By Income:</u>				
Under \$25,000	50	51	14	62
\$25,000-\$34,999	66	64	15	71
\$35,000+	78	79	18	73
<u>By People Contributing To Household Income:</u>				
One	55	53	14	65
Two or more	63	64	15	67
<u>By Education:</u>				
Less than HS grad	52	50	20	58
High school grad	58	56	13	64
1-3 years of college	55	60	15	71
College grad or more	69	69	14	69
<u>By Marital Status:</u>				
Married	65	65	16	71
Divorced/widowed/ separated	50	51	10	58
Never married	51	52	14	58
<u>By Household Size:</u>				
One	51	50	11	54
Two	64	64	15	71
Three or more	59	60	15	66
<u>By Length Of Residence In Area:</u>				
9 years or less	47	50	13	65
10+ years/entire life	66	65	15	66

Traders

In many areas of the country, publications containing advertising for only one type of product, e.g., cars, can be purchased. These buying guides or "traders" represent potentially significant competition to the daily newspaper's classified advertising, primarily because they often contain photos of the advertised product.

More than one-half (56%) of the adults in the local markets have seen one of these buying guides, and 44 percent have "looked into" them at one time or another (see Table 1.9). However, only 10 percent of adults looked into a buying guide in the past week; an additional 12 percent saw one in the past month, but longer ago than one week. Thus, the past month's reach of all "traders" combined is much lower than the past week's reach of local daily newspapers.

Again, there are substantial local variations in the availability of traders: in Market I, 64 percent of adults have seen a trader but in Market IV, only 41 percent have seen one. Past week's usage also varied significantly: from 7 percent in Market II to 13 percent in Market I.

Usage of buying guides or "traders" within the past month is made more often by males, those 18-54 years old, upper-income (\$35,000+) adults, people within two-earner households, and those with at least some college education (see Table 1.10). Because awareness and readership of these buying guides are more common among the upper-income segments, they must be considered a potential threat to certain categories (e.g., home and automotive) of the daily newspaper's classified business.

Table 1.9
BUYING GUIDES/"TRADERS"

	Total	Market			
		I	II	III	IV
Base: Total Respondents	(800)	(200)	(200)	(200)	(200)
Ever Saw Buying Guides/ "Traders"	56%	64%	57%	61%	41%
Ever Looked Into Buying Guides/"Traders"	44	54	46	46	30
In past week	10	13	7	10	12
In past month	12	17	11	15	6
More than a month ago	20	22	27	20	11
Don't know	2	3	2	1	2
Never Looked Into Buying Guides/"Traders"	12	10	11	15	11
Never Saw Buying Guides/ "Traders"	44%	36%	43%	39%	59%

Questions: "In some communities, buying guides or 'traders' — consisting mostly of advertising for only one kind of product, like automobiles or homes are available. Have you ever seen any publications like this in your community?"

(IF YES) "Have you ever read or looked into such a publication?" (IF YES) "When was the last time you looked into one?"

Table 1.10

PAST MONTH USE OF BUYING GUIDES/TRADERS
AMONG DEMOGRAPHIC GROUPS

	<u>Total</u>	<u>Market</u>			
		<u>I</u>	<u>II</u>	<u>III</u>	<u>IV</u>
<u>Total Respondents</u>	22½	30½	18½	25½	18½
<u>By Sex:</u>					
Male	26	33	23	22	24
Female	20	26	13	28	11
<u>By Age:</u>					
18-34	24	34	26	23	15
35-54	25	30	15	35	21
55 or older	17	23	12	16	17
<u>By Income:</u>					
Under \$25,000	21	20	24	24	17
\$25,000-\$34,999	20	24	16	24	14
\$35,000+	33	44	16	40	26
<u>By People Contributing To Household Income:</u>					
One	20	25	14	24	16
Two or more	25	32	21	26	18
<u>By Education:</u>					
Less than HS grad	17	13	26	13	11
High school grad	21	23	22	25	14
1-3 years of college	26	44	12	23	23
College grad or more	24	34	7	32	21
<u>By Marital Status:</u>					
Married	23	29	18	26	20
Divorced/widowed/ separated	19	25	22	22	10
Never married	24	33	16	24	18
<u>By Household Size:</u>					
One	18	24	7	31	13
Two	21	27	20	23	13
Three or more	25	34	19	22	23
<u>By Length Of Residence In Area:</u>					
9 years or less	23	27	20	25	18
10+ years/entire life	22	31	17	25	17

SECTION TWO. FREE WEEKLIES: USES AND GRATIFICATIONS

Respondents who had read a free weekly in the past week were asked if there was anything in that paper that they found useful or interesting. Four-fifths (82%) of free weeklies' readers did find some part of their content interesting or useful (see Table 2.1). There was a wide range of variation in these proportions: from 66 percent in Market I to 90 percent in Market IV.

Table 2.1

FOUND SOMETHING USEFUL OR INTERESTING IN FREE WEEKLY READ

	Total	Market			
		I	II	III	IV
Base: Read A Free Weekly In Past Week	(454)	(85)	(117)	(116)	(136)
Yes, found something interest- ing or useful	82%	66%	79%	85%	90%
No	16	28	16	14	10
Don't know	2	6	4	1	-

Questions: "First of all, not counting today, have you read or looked at a free weekly paper since last (DAY OF INTERVIEW)?"
(IF YES) "Is there anything in that free weekly that you personally find useful or interesting?"

Those free weekly readers who claimed to find something worth reading or looking at were then asked to name those parts of the paper.

Four-fifths (81%) mentioned one or more types of advertising, and one-third (32%) volunteered some category of editorial content as having attracted their attention (see Table 2.2). Interest in free weeklies' advertising ranged from 54 percent to 91 percent, while interest in news or editorial features varied between 10 percent and 54 percent.

The most frequently mentioned advertising items were the help-wanted ads (24%), grocery store ads (21%), and advertising in general (17%). The most often volunteered categories of editorial content were the calendar of local events and the local news (9% each).

There were substantial variations among the four markets in responses to this question. In Market I, citations of certain items of advertising and editorial content were equal (54% each). The calendar of local events (30%) and the help-wanted ads (25%) were the two predominant items of interest in that market.

Readers of free weeklies in Market II showed a greater interest in advertising (74%) and a lesser interest in editorial content (49%). Citation of useful types of advertising in this market were more widely dispersed: they included help-wanted ads (26%), non-specific store ads (16%), grocery store ads (13%), sales/bargains (12%), and garage sales (10%). Editorial content items mentioned more often included local news (23%), calendar of local events (13%), and school news (12%).

Table 2.2

USES AND GRATIFICATIONS OF FREE WEEKLY READ

	Total	Market			
		I	II	III	IV
Base: Past Week Readers Of A Free Weekly Who Found Something Useful/ Interesting	(371)	(56)	(93)	(99)	(123)
<u>Advertising (Net)</u>	<u>81½</u>	<u>54½</u>	<u>74½</u>	<u>91½</u>	<u>90½</u>
Help-wanted/job ads	24	25	26	32	15
Grocery store ads	21	-	13	8	46
Ads/the advertising (Non-specific)	17	7	5	22	25
Sales/bargains	12	11	12	16	11
Garage/yard/rummage sales	11	4	10	8	18
Store ads (Non-specific)	10	5	16	11	7
Coupons	6	2	5	5	8
Auto ads	5	4	-	11	6
<u>News/Editorial Features (Net)</u>	<u>32½</u>	<u>54½</u>	<u>49½</u>	<u>10½</u>	<u>28½</u>
Local events/calendar of events	9	30½	13	2	2
Local news	9	9	23	1	4
TV listings	6	-	-	2	16
School news	4	2	12	1	-
Recipes	2	5	5	-	1
Columnists	1	5	-	-	-
Other	5	11	2	4	5
Don't know/nothing specific	3	2	1	3	4

Note: Columns add to more than 100%: multiple answers were coded.

Questions: "First of all, not counting today, have you read or looked at a free weekly paper since Last (DAY OF INTERVIEW)?"

(IF YES) "Is there anything in that free weekly paper that you personally find useful or interesting?" (IF YES) "What is it that you find useful or interesting?"

The free weeklies in Markets III and IV were interesting or useful principally for their advertising. Nine-tenths of the readers of free weeklies in these two markets mentioned at least one type of advertising content in responding to this question. The main advertising items of interest in Market III were help-wanted ads (32%), advertising in general (22%), and sales/bargains (16%). The corresponding items in Market IV were grocery store ads (46%), advertising in general (25%), garage sales (18%), and help-wanted ads (15%).

Editorial items appealed to only 10 percent of readers of free weeklies in Market III, but to 28 percent in Market IV. The key editorial feature in the latter market were the TV listings (16%).

It is apparent from these detailed findings that free weeklies vary substantially in their general appeal to readers, as indicated by their level of readership and by whether certain items of advertising or editorial content are readily cited as interesting or useful. In certain markets the free weeklies appear to be more of a competitive threat, seen from the readers' perspectives, than in others—mainly in the realm of advertising, but (as in Market I and II) also in the area of local editorial content coverage.

SECTION THREE. ATTITUDES TOWARD DAILY NEWSPAPERS
AND FREE WEEKLIES

Strengths and Weaknesses of Local Daily Newspapers

This section explores how daily newspapers and free weeklies were evaluated both as to their editorial and advertising content and as sources of shopping information for different types of products.

Adults in the four markets were most likely to say that their daily paper "tells you more of what is going on outside your community" (85% vs. 5%), "tells you what is going on in your community" (77% vs. 13%), and "has the best help-wanted and employment ads" (76% vs. 6%) compared with free weeklies (see Table 3.1). The preference for the daily newspaper was relatively less marked for "has the best automobile ads for car buyers" (54% vs. 22%), "is most useful for your food shopping" (55% vs. 29%), and "is the best place to look for information on local stores and services" (58% vs. 25%). But no comparison produced a majority of adults who chose free weekly papers over the local daily across the four markets.

Daily newspapers are rated a better source of shopping information than are free weeklies for clothing items (76% vs. 11%), reflecting two of their prime sources of advertising—department and retail clothing stores. More than three-fifths of the respondents also said daily newspapers were a better source of shopping information for four other items—a new TV set, living room furniture, carpeting, and small kitchen appliances.

Table 3.1

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND
FREE WEEKLIES: FOUR-MARKET TOTALS

	Those Answering		
	Daily News- paper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
<u>Editorial And Advertising Content-</u>			
<u>Statement Is More True Of:</u>			
Tells you more of what is going on outside your community	85%	5%	3%
Tells you what is going on in your community	77	13	4
Has the best help-wanted and employment ads	76	6	4
Has the best coverage of your local school board	69	15	4
Has the best cents-off coupons	66	16	5
Has the best classified ads for houses and apartments	65	17	4
Is the best place to look for infor- mation on local stores and services	58	25	8
Is most useful for your food shopping	55	29	6
Has the best automobile ads for car buyers	54	22	6
<u>Better Source Of Shopping Information On:</u>			
Clothing items	76%	11%	5%
A new TV set	64	16	9
Living room furniture	63	16	9
Small kitchen appliances	63	18	8
Carpeting	62	16	8

Questions: "Now I'm going to read some statements which might be used to describe your local daily newspaper and free weekly newspapers. Please tell me whether each statement is more true of the daily newspaper or of the free weekly newspapers. The first is . . . (READ EACH STATEMENT)"

"Suppose you were thinking of buying some clothing and wanted to look at some ads for style, prices, brands, what's available locally, and so on. Please tell me which of the two—the daily newspaper or the free weekly paper—would be a better source of shopping information on clothing? What about . . . (CONTINUE WITH EACH ITEM.)"

There were often substantial differences among the four markets in the comparative advantage held by the local dailies (see Table 3.2 and Appendix Tables A.4-A.7). Perhaps the most striking contrast was found in response to this statement: "Is the most useful for your food shopping." Dailies in Markets I and III scored well above average on this item, but the daily in Market IV scored 35 percentage points below the four-market average. (The free weekly in this market has 50% of all food advertising inserts.)

The local daily in Market I received ratings higher than the four-market average for all three statements dealing with classified advertising—houses and apartments, cars, and help-wanted ads, as well as for food shopping, cents-off coupons, information on local stores, and as a source of shopping information for all five specific items. Its coverage of the local school board received ratings higher than the four-market average too.

In contrast, the local daily in Market II scored lower than the four-market average for its coverage of both community news and the local school board, and as an information source on local stores and services. Its greatest advertising strengths are in all three areas of classified ads and cents-off coupons.

Adults in Market III rated their daily newspaper very highly on its coverage of community news and of the local school board, as well as its usefulness for food shopping. They rated the daily much lower, relative to free weeklies, for its automobile ads and slightly less well as a source of

Table 3.2

RATINGS OF LOCAL DAILY NEWSPAPER VS. FREE WEEKLIES

Base: Total Respondents	Total (800)	Market			
		I (200)	II (200)	III (200)	IV (200)
Editorial and Advertising					
Content- $\frac{1}{2}$ saying statement is "more true of the daily newspaper"					
Tells you more of what is going on outside your community	85%	84%	84%	88%	85%
Tells you more of what is going on in your community	77	76	61	85	85
Has the best help-wanted and employment ads	76	82	76	75	73
Has the best coverage of your local school board	69	77	44	82	72
Has the best cents-off coupons	66	75	73	68	47
Has the best classified ads for houses and apartments	65	72	69	64	56
Is the best place to look for information on local stores and services	58	71	54	58	48
Is the most useful for your food shopping	55	77	58	68	20
Has the best automobile ads for car buyers	54	66	63	42	45
Daily Newspaper is a "better source of shopping infor- mation" for:					
Clothing items	76%	80%	75%	74%	76%
A new TV set	64	73	63	61	61
Living room furniture	63	71	68	58	55
Small kitchen appliances	63	72	64	58	57
Carpeting	62	71	67	57	56

shopping information for living room furniture, carpeting, and small kitchen appliances.

Respondents in Market IV gave their daily newspaper very high ratings on its coverage of the local community, but only a minority felt it was more useful than the free weekly for food shopping (see Table A.7). This is the only instance in which a majority of respondents said the statement is more true of the free weekly newspaper. They also gave the daily lower than average ratings for its cents-off coupons, classified ads for houses and apartments, automobile ads, as a source of information on local stores and services, and as a source of shopping information for living room furniture, carpeting, and small kitchen appliances. Clearly, given the much higher-than-average readership of the free weekly in this market (see Table 1.5), this daily is not doing as well in the competitive struggle as it ought to be doing—based on the greater dominance shown by the local dailies in the other three markets.

Weekly Grocery Expenditures and Attitudes Toward Local Print Media

Readership of free weeklies varied only slightly among groups of adults with different levels of weekly spending on groceries (see Table 3.3). Overall, the proportion who read a free weekly was highest (59%) among adults spending \$76 or more per week on groceries, but the differences among adults with lower average weekly grocery expenditures were not great.

Readership of the local daily paper also varied only slightly among those who spent different amounts on groceries, although some variations in this pattern exist within each of the four markets.

Table 3.3

READERSHIP OF LOCAL DAILY AND FREE WEEKLIES
BY WEEKLY GROCERY EXPENDITURE

	Total	Market			
		I	II	III	IV
Base: Total Respondents					
% Who Read A Free Weekly In Past Week					
<u>Total</u>	57½	43½	58½	58½	68½
Less than \$50	55	42	54	53	69
\$50-\$75	57	43	60	60	68
\$76+	59	44	60	62	68
MEDIAN (\$) AMONG THOSE READING FREE WEEKLY	61	60	63	67	55
% Who Read The Local Daily In Past Week					
<u>Total</u>	80½	77½	88½	81½	74½
Less than \$50	79	69	93	84	72
\$50-\$75	80	81	83	80	74
\$76+	83	33	87	79	83
MEDIAN (\$) AMONG THOSE READING LOCAL DAILY	61	62	61	64	57

Question: "Just as a rough guess, how much would you say your household spends per week on groceries? Less than \$50, between \$50 and \$75, between \$75 and \$100, more than \$100?"

The median amounts spent per week on groceries by readers of the local daily newspaper and of the free weeklies were almost identical in all four markets. Neither medium can claim to be read disproportionately by adults who spend heavily on groceries. In addition, adults with the highest and the lowest weekly grocery expenditures were about equally likely to perceive the grocery store ads in free weeklies to be useful.

The percentages of free weekly readers who found the grocery store ads useful or interesting also did not vary greatly according to weekly grocery expenditures; they ranged between 15 percent among those spending \$50-\$75 to 25 percent among those who spend less than \$50 for their groceries (see Table 3.4). Again, there were wide variations among the four markets. None of the respondents in Market I felt that the free weekly they read contained useful grocery store ads. (These free weeklies had hardly any ads of this type.) However, in Market IV, almost one-half (46%) of all free weekly readers volunteered that the grocery store ads were of some use to them, and this was most frequent among those who spent over \$75 per week on their groceries (57%).

Table 3.4

USE OF FREE WEEKLIES
BY GROCERY EXPENDITURE

	<u>Total</u>	<u>I</u>	<u>II</u>	<u>III</u>	<u>IV</u>
<u>Market</u>					
Base: Read A Free Weekly And Found Something Useful Or Interesting					
Used Free Weekly For <u>Grocery Store Ads</u>					
<u>Total</u>	21½	—½	13½	8½	46½
Less than \$50	25	—	14	13	46
\$50-\$75	15	—	9	8	37
\$76+	22	—	16	6	57
MEDIAN (\$) AMONG THOSE FINDING GROCERY STORE ADS INTERESTING/USEFUL					
	58	—	67	63	56

Conclusions

The readership of local daily newspapers consists disproportionately of upper-income, better-educated adults with strong ties to their community, the type of audience that is most attractive to many advertisers. Although free weeklies also have wide distribution and readership among these groups, the vast majority of their readers also read the local daily at least once a week. Ads in free weeklies are available to relatively few adults who cannot see them in the local daily.

Not surprisingly, free weeklies are seen as useful primarily for their advertising. Local daily newspapers received their strongest ratings (vs. free weeklies) for all categories of their editorial content and advertising, particularly for classified ads and shopping information for clothing. The free weeklies show competitive appeal for their automotive ads, for their usefulness for food shopping, and for their use as a source of information on local stores and services.

The overall picture is one in which the local dailies outpace the non-dailies in their reach and competitive benefits. But, given the variations across markets in the measures used in this study, it is clear that areas of vulnerability can coexist within this generally strong competitive position. Individual daily newspapers need to evaluate the perceptions of adults in their own communities periodically in formulating marketing plans to meet the competition of free and paid weeklies.

100-100000

SECTION FOUR. THE NATIONAL REACH OF DAILIES AND NONDAILIES

Nationally, according to the June 1986 Roper Reports omnibus survey, 83 percent of adults read at least one issue of a daily newspaper in the past week (see Table 4.1). This proportion is much greater than the proportion who read a free weekly (57%).* There is, however, a substantial overlap in the readership of daily newspapers and of free weeklies (see Table 4.2). One-half (50%) of all adults read one or more editions of a daily newspaper and a free weekly in the past week. One-third (33%) of American adults read at least one issue of a daily newspaper but not a free weekly; by way of contrast, only 7 percent read a free weekly but no issues of a daily paper during the past week. Looked at another way, the readership duplication between dailies and free weeklies is very high. Only 12 percent of readers of a free weekly did not also read a daily newspaper in the past week.

Three-fourths (72%) of American adults read or looked into some part of a Sunday newspaper in the past week (see Table 4.3). The past week net reach of daily and Sunday newspapers amounts to 87 percent of American adults—the 83 percent who read a daily plus the 4 percent who read only a

* The 57 percent net reach of free weeklies in the Roper study can have included the TMC editions increasingly being published by local daily papers as well as shoppers, pennysavers, or other local nondailies. Some of these are published on a bi-weekly (or more frequent) basis, thus increasing their net reach potential. As shown above, the four-market reach of free weeklies (specifically excluding TMC products) ranged between 43%-68% (see p. 5).

Table 4.1

PAST WEEK REACH: DAILY NEWSPAPERS AND FREE WEEKLIES

	<u>Total</u> (1994)
Base: Total Respondents	
Daily newspaper	83%
Free weekly	57

Questions: "I'd like you to tell me whether you, yourself, have read or looked at any daily newspapers within the past seven days—that is, since last (DAY OF INTERVIEW: IF SUNDAY INTERVIEW, SAY 'since a week ago Saturday')"

"How about papers that are available or delivered to you free of charge, such as free weeklies, shoppers, or penny-savers. Have you, yourself, read or looked at any of these free papers in the past 7 days?" (INTERVIEWER: DO NOT ACCEPT CIRCULARS OR FLYERS WITH ADS FOR ONLY ONE STORE AS A FREE WEEKLY.)

\ Table 4.2

DUPLICATED READERSHIP BETWEEN
DAILY NEWSPAPERS AND FREE WEEKLIES

	<u>Total</u> (1994)
Base: Total Respondents	
<u>Read A Daily Newspaper In Past Week</u>	<u>83%</u>
And read a free weekly	50
And did not read a free weekly	33
<u>Did Not Read A Daily In Past Week</u>	<u>17</u>
And read a free weekly	7
And did not read a free weekly	10
Readership duplication between free weeklies and dailies (50%/57%)	88%

Sunday paper in the past week. The remaining 13 percent of adults did not read either a daily or a Sunday paper in the past week.

Thus, on the national level, the past week reach of daily newspapers and Sunday newspapers, alone or in combination, greatly exceeds the reach of free weeklies: seven out of eight American adults looked at one or more copies of a newspaper.

Table 4.3

PAST WEEK REACH OF
DAILY OR SUNDAY NEWSPAPER

	<u>Total</u> (1994)
Base: Total Respondents	
<u>Read A Daily Newspaper In Past Week</u>	<u>83%</u>
And read a Sunday newspaper	68
Read a daily newspaper only	15
<u>Did Not Read A Daily Newspaper</u>	
<u> In Past Week</u>	<u>17</u>
And read a Sunday newspaper	4
Did not read a Sunday newspaper	13
Read a Sunday newspaper in past week (net)	72%
Past week reach of daily or Sunday newspaper (net)	87%

Question: "And did you read or look into any part of
a Sunday paper in the past seven days?
(IF SUNDAY INTERVIEW ADD 'including today')"

Past week readership of daily and Sunday newspapers is significantly higher among all demographic groups than is the readership of free weeklies, particularly among the higher-income groups that are of special interest to many advertisers (see Table 4.4).

Table 4.4

PAST WEEK READERSHIP AMONG DEMOGRAPHIC GROUPS

	(Base:)	Past Week Readership Of:		
		Daily News-paper	Sunday News-paper	Free Weekly
Total	(1994)	83%	72%	57%
By Sex:				
Male	(941)	84	72	54
Female	(1052)	82	73	60
By Age:				
18-29	(590)	79	69	52
30-44	(552)	84	74	59
45-59	(405)	87	78	60
60+	(446)	81	71	59
By Income:				
Under \$15,000	(578)	74	59	51
\$15,000-\$24,999	(499)	82	71	60
\$25,000-\$34,999	(399)	85	79	62
\$35,000 and over	(478)	92	85	58
By Education:				
Less than HS grad	(429)	69	54	51
High school grad	(736)	83	73	58
Some college +	(814)	89	82	60
By Region:				
Northeast	(438)	90	79	57
Midwest	(498)	84	72	66
South	(658)	78	69	50
West	(399)	81	71	58

Table 4.5 presents readership data by population size. It shows that past week readership of the daily newspaper is higher than average in smaller and middle-sized cities: in non-metropolitan cities (87%); in suburbs of central cities with 250,000-1 million population (86%); and in central cities with 50,000-250,000 population (86%) and their suburbs (84%).

Past week reach of free weekly papers was highest in the suburbs of central cities with at least one million population (73%) and lowest in their neighboring big cities (44%).

Duplicated readership of daily newspapers and free weeklies is consistently in the high eighties to low nineties, except in the suburbs of the largest central cities (85%), and non-metro towns and open country (84%). This finding demonstrates that the overlap among readers of daily newspapers and of free weeklies is quite high in almost all urbanized areas. As a result, ads placed in a free weekly reach only a relatively few readers who haven't also read the daily newspaper during that week.

Table 4.5

PAST WEEK READERSHIP BY POPULATION SIZE

	Past Week Reader- ship Of:		Duplicated Readership: Daily And Free Weekly
	<u>Daily paper</u>	<u>Free Weekly</u>	
Base: Total Respondents			
<u>Total</u>	<u>83½</u>	<u>57½</u>	<u>88½</u>
Central cities 1 million and over	79	44	89
Suburbs of central cities 1 million and over	81	73	85
Central cities 250,000- 1 million	81	57	87
Suburbs of central cities 250,000-1 million	86	59	89
Central cities 50,000- 250,000	86	52	91
Suburbs of central cities 50M-250M	84	51	89
Non-metro cities 10,000- 49,999	87	60	95
Non-metro towns under 10M and open country	78	64	84

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APPENDIX TABLES

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Table A.1
RESPONDENT BASES

<u>Total Respondents</u>	<u>Total</u> (800)	<u>Market</u>			
		<u>I</u> (200)	<u>II</u> (200)	<u>III</u> (200)	<u>IV</u> (200)
<u>By Sex:</u>					
Male	400	100	100	99	101
Female	400	100	100	101	99
<u>By Age:</u>					
18-24	118	28	30	39	21
25-29	99	27	20	32	20
30-34	106	19	28	29	30
35-44	163	46	40	37	40
45-54	90	27	20	20	23
55-64	101	31	24	23	23
65 or older	121	22	36	20	43
<u>By Income:</u>					
Under \$10,000	99	18	13	37	31
\$10,000-\$14,999	104	19	23	33	29
\$15,000-\$24,999	181	37	42	49	53
\$25,000-\$34,999	128	29	38	33	28
\$35,000 and over	174	66	44	30	34
Refused	114	31	40	18	25
<u>By People Contributing</u>					
<u>To Household Income:</u>					
One	334	79	78	80	97
Two	399	102	102	106	89
Three or more	65	19	18	14	14
<u>By Employment:</u>					
Working full-time	438	115	112	91	120
Working part-time	79	24	20	18	17
Unemployed	14	5	1	7	1
Retired	116	24	35	25	32
Student	43	7	3	28	5
Homemaker	104	23	28	30	23

(Continued)

Table A.1
RESPONDENT BASES
(Continued)

	<u>Total</u> (800)	<u>Market</u>			
		<u>I</u> (200)	<u>II</u> (200)	<u>III</u> (200)	<u>IV</u> (200)
<u>Total Respondents</u>					
<u>By Education:</u>					
Less than HS grad	121	23	46	24	28
High school grad	290	78	77	59	76
1-3 years of college	176	43	33	56	44
College grad	142	41	23	44	34
Postgraduate study	64	11	20	15	18
<u>By Marital Status:</u>					
Married	478	123	125	110	120
Divorced/widowed/ separated	137	28	36	32	41
Never married	182	48	37	58	39
<u>By Household Size:</u>					
One	133	34	28	26	45
Two	283	74	66	74	69
Three	160	38	41	48	33
Four	132	33	39	33	27
Five or more	89	21	23	19	26
<u>By Length Of Residence In Area:</u>					
2 years or less	104	26	16	34	28
3-5 years	103	24	25	34	20
6-9 years	83	25	14	25	19
10+ years/entire life	510	125	145	107	133
<u>By Weekly Grocery Expenditure:</u>					
Less than \$50	275	71	61	57	86
\$50-\$75	273	72	78	70	53
\$76-\$100	149	33	35	39	42
\$100+	74	19	17	27	11

Table A.2

PROFILES OF LOCAL PRINT MEDIA READERSHIP:
FOUR MARKET TOTALS

	Local Daily Newspaper		Sunday Paper	Free Weekly
	Yester- day	Past Week		
<u>Total Respondents</u>	<u>60½</u>	<u>80½</u>	<u>76½</u>	<u>57½</u>
<u>By Sex:</u>				
Male	54	51	51	50
Female	46	49	49	50
<u>By Age:</u>				
18-34	31	37	36	40
35-54	33	32	33	34
55 or older	36	31	30	26
<u>By Income:</u>				
Under \$25,000	50	53	52	56
\$25,000-\$34,999	20	19	19	18
\$35,000+	30	28	29	26
<u>By People Contributing To Household Income:</u>				
One	44	42	40	42
Two or more	56	58	59	58
<u>By Education:</u>				
Less than HS grad	16	15	15	16
High school grad	31	35	34	37
1-3 years of college	20	21	22	23
College grad or more	31	28	28	24
<u>By Marital Status:</u>				
Married	63	61	62	63
Divorced/widowed/ separated	19	18	17	17
Never married	18	21	21	20
<u>By Household Size:</u>				
One	17	16	15	17
Two	39	37	37	35
Three or more	43	46	47	48
<u>By Length Of Residence In Area:</u>				
9 years or less	31	33	32	37
10+ years/entire life	69	67	68	63

Table A.3

PROFILES OF HOME DELIVERY OF
LOCAL PRINT MEDIA: FOUR MARKETS

	<u>Local Daily Paper</u>	<u>Sunday Paper</u>	<u>Free Weekly</u>
<u>Total Respondents</u>	<u>59%</u>	<u>60%</u>	<u>66%</u>
<u>By Sex:</u>			
Male	52	52	48
Female	48	48	52
<u>By Age:</u>			
18-34	31	34	41
35-54	34	33	33
55 or older	35	33	26
<u>By Income:</u>			
Under \$25,000	47	47	52
\$25,000-\$34,999	20	20	20
\$35,000+	33	33	28
<u>By People Contributing To Household Income:</u>			
One	41	40	43
Two or more	59	60	57
<u>By Education:</u>			
Less than HS grad	13	13	13
High school grad	36	34	36
1-3 years of college	20	22	24
College grad or more	30	30	27
<u>By Marital Status:</u>			
Married	66	65	65
Divorced/widowed/ separated	15	15	15
Never married	20	20	20
<u>By Household Size:</u>			
One	14	14	14
Two	38	38	38
Three or more	47	48	48
<u>By Length Of Residence In Area:</u>			
9 years or less	29	31	36
10+ years/entire life	71	69	64

Table A.4

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND
FREE WEEKLIES: MARKET I

	<u>Those Answering</u>		
	<u>Daily</u> <u>News-</u> <u>paper</u>	<u>Free</u> <u>Weekly</u>	<u>Neither/</u> <u>Both</u> <u>Equal</u>
Base: Total Respondents			
<u>Editorial And Advertising Content-</u>			
<u>Statement Is More True Of:</u>			
Tells you what is going on in your community	76%	16%	3%
Has the best classified ads for houses and apartments	72	14	4
Is most useful for your food shopping	77	12	5
Has the best automobile ads for car buyers	66	16	4
Tells you more of what is going on outside your community	84	8	3
Has the best help-wanted and employment ads	82	5	2
Has the best coverage of your local school board	77	9	2
Has the best cents-off coupons	75	11	6
Is the best place to look for information on local stores and services	71	17	6
<u>Better Source Of Shopping Information On:</u>			
Clothing items	80%	11%	4%
A new TV set	73	14	6
Living room furniture	71	15	6
Carpeting	71	15	6
Small kitchen appliances	72	15	7

Table A.5

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND
FREE WEEKLIES: MARKET II

	Those Answering		
	Daily News- paper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
<u>Editorial And Advertising Content-</u>			
<u>Statement Is More True Of:</u>			
Tells you what is going on in your community	61½	28½	7½
Has the best classified ads for houses and apartments	69	16	3
Is most useful for your food shopping	58	28	5
Has the best automobile ads for car buyers	63	13	5
Tells you more of what is going on outside your community	84	8	3
Has the best help-wanted and employment ads	76	8	4
Has the best coverage of your local school board	44	39	6
Has the best cents-off coupons	73	12	4
Is the best place to look for information on local stores and services	54	32	6
<u>Better Source Of Shopping Information On:</u>			
Clothing items	75½	12½	5½
A new TV set	63	15	10
Living room furniture	68	12	8
Carpeting	67	13	7
Small kitchen appliances	64	13	10

Table A.6

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND
FREE WEEKLIES: MARKET III

	Those Answering		
	Daily News- paper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
<u>Editorial And Advertising Content-</u>			
<u>Statement Is More True Of:</u>			
Tells you what is going on in your community	85%	4%	4%
Has the best classified ads for houses and apartments	64	18	5
Is most useful for your food shopping	68	13	10
Has the best automobile ads for car buyers	42	34	8
Tells you more of what is going on outside your community	88	2	3
Has the best help-wanted and employment ads	75	6	6
Has the best coverage of your local school board	82	3	4
Has the best cents-off coupons	68	14	6
Is the best place to look for information on local stores and services	58	19	10
<u>Better Source Of Shopping Information On:</u>			
Clothing items	74%	10%	8%
A new TV set	61	14	13
Living room furniture	58	17	14
Carpeting	57	15	12
Small kitchen appliances	58	20	11

Table A.7

COMPARATIVE RATINGS OF DAILY NEWSPAPERS AND
FREE WEEKLIES: MARKET IV

	Those Answering		
	Daily News- paper	Free Weekly	Neither/ Both Equal
Base: Total Respondents			
<u>Editorial And Advertising Content-</u>			
<u>Statement Is More True Of:</u>			
Tells you what is going on in your community	85%	6%	4%
Has the best classified ads for houses and apartments	56	20	4
Is most useful for your food shopping	20	64	7
Has the best automobile ads for car buyers	45	26	8
Tells you more of what is going on outside your community	85	5	3
Has the best help-wanted and employment ads	73	5	4
Has the best coverage of your local school board	72	10	4
Has the best cents-off coupons	47	29	7
Is the best place to look for information on local stores and services	48	31	10
<u>Better Source Of Shopping Information On:</u>			
Clothing items	76%	12%	5%
A new TV set	61	20	9
Living room furniture	55	21	9
Carpeting	56	21	8
Small kitchen appliances	57	25	5

TECHNICAL APPENDIX

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TECHNICAL APPENDIX

This technical appendix was written by MORI Inc.

A total of 800 interviews was completed by telephone from two central, monitored WATS facilities using trained interviewers. The questionnaire used required an average of 12 minutes for each completed interview. A copy of the questionnaire is appended to this report.

A pretest was conducted May 29, 1986 and actual interviewing took place during the period June 3-7. Interviewing was conducted Tuesday through Saturday, with equal quotas for males and females by day and by market to enable measurement of "yesterday" readership of the daily newspapers in each market.

Phone numbers were selected from a computer-generated, random-digit dialing list provided by Survey Sampling, Inc. One predesignated respondent was chosen from each household on the basis of sex and relative age. Respondents were screened for residence in the selected county. Up to four attempts were made to reach the designated respondent before a substitute phone number was used. Because of the limited time frame for interviewing, many of the numbers that were dialed late in the week were not called back. Two hundred interviews each were conducted in the home counties of the four daily newspapers.

Distribution of phone contacts was as follows:

Total phone numbers dialed	2,940
- Disconnected numbers	664
- Not eligible (wrong county)	117
- Business phone	133
VALID NUMBERS	2,026
Deaf/language problems	36
No answer/refused/terminated	573
Completed interviews	800

The pattern of completions was as follows:

Completed on the FIRST call	56%
Completed on the SECOND call	25
Completed on the THIRD call	12
Completed on the FOURTH call	7
TOTAL	100%

A sample of 10% of each interviewer's work was monitored or validated.

No irregularities were revealed in validation.

Completed questionnaires were edited, and open-ended responses were coded using a sample of about 50 interviews from each market to develop coding categories. Data were keypunched into two independent files to permit verification. They were then cleaned and processed by crosstabulation.

FOUR-MARKET STUDY QUESTIONNAIRE

TIME STARTED: _____ RESP. NO. _____ (1-4)
TIME FINISHED: _____ CARD NO. 1 (5)
DAY OF INTERVIEW: TUESDAY...1 MARKET: _____ (6-7)
WEDNESDAY...2
THURSDAY...3
FRIDAY...4
SATURDAY...5

Hello. I'm _____ of MORI Research, an independent marketing research company. We're conducting a survey of how people in your area get their news and shopping information.

Just to be sure I have it right, is this [READ PHONE NUMBER]?

[WRITE IN] (_____) _____ - _____ (8-17)

And to make sure that I'm calling in the right area, would you please tell me what county you live in?

[WRITE IN] _____

[CHECK AGAINST LIST OF ELIGIBLE COUNTIES. TERMINATE IF NOT ON LIST.]

For the purposes of this survey I need to speak with the [SEE BOX CHECKED BELOW] who lives in your household and is age 18 or older.

DESIGNATED RESPONDENT		SUBSTITUTE
[] YOUNGEST MAN	————→	[] YOUNGEST WOMAN
[] OLDEST MAN	————→	[] OLDEST WOMAN
[] YOUNGEST WOMAN	————→	[] YOUNGEST MAN
[] YOUNGEST MAN	————→	[] YOUNGEST WOMAN
[] OLDEST MAN	————→	[] OLDEST WOMAN
[] YOUNGEST WOMAN	————→	[] YOUNGEST MAN
[] OLDEST WOMAN	————→	[] OLDEST MAN

IF THE SELECTED RESPONDENT IS NOT AT HOME, ASK WHEN IT WOULD BE CONVENIENT TO CALL THAT PERSON BACK. IF THERE IS NO SUCH PERSON IN THE HOUSEHOLD, SUBSTITUTE THE OPPOSITE SEX.

IF THE PERSON SELECTED DECLINES TO BE INTERVIEWED, REMIND HIM/HER THAT IT IS VERY IMPORTANT THAT PEOPLE WITH OPINIONS LIKE HIS/HERS ARE REPRESENTED IN THE SURVEY. IF NECESSARY, ASK IF YOU CAN MAKE AN APPOINTMENT TO CALL BACK LATER. IF YOU DO THAT, GET THE RESPONDENT'S FIRST NAME, SO YOU'LL KNOW WHOM TO ASK FOR.

[WHEN THE DESIGNATED RESPONDENT IS ON THE LINE, SAY:]

Hello. This is _____ calling for MORI Research, an independent marketing research company. We're conducting a survey of how people in your area get their news and shopping information. You are the person I need to talk to in this household so that our survey will be accurate.

[GO TO FIRST QUESTION]

CALL #1: _____

CALL #2: _____

CALL #3: _____

CALL #4: _____

INTERVIEWER: _____

1. In your personal opinion, what would you say was the most interesting item in the news yesterday or today? [IF CAN'T RECALL, SKIP TO Q.3.]

(18-19)

[IF THE RESPONDENT MENTIONS SOMETHING IN Q.1, ASK:]

2. Where did you learn about that news? [PROBE: "Any others?" ACCEPT MORE THAN ONE RESPONSE; CIRCLE ALL MENTIONED.]

(20-27)

Television.....
Newspaper.....
Radio.....
"Word of mouth".....
OTHER [WRITE IN:]
Don't know.....

Now, I would like to ask you about daily newspapers, the ones that come out every weekday, Monday through Friday. It is very important for us to know when the different papers are read.

[ASK EVERYONE:]

3. When was the last time you read or looked into a weekday copy of the

Today.....1
[ASK: And when was the last time before today?]

(28)

Yesterday.....1 → ASK Q.4
Before yesterday.....2 → SKIP TO Q.5
Never.....3 → SKIP TO Q.5

(29)

[IF READ YESTERDAY IN Q.3, ASK:]

4. Was the copy of the _____ you read yesterday delivered to your home, bought outside your home, or did you get it some other way?

Delivered.....1
Bought outside the home.....2
Some other way.....3
Don't know/no answer.....4

ALL SKIP
TO Q.6

(30)

[IF IS NOT READ "YESTERDAY," ASK:]

5. Do you or your family get home delivery of the

Yes.....1
No.....2

(31)

[IF NOT HOME DELIVERY IN Q.4 OR Q.5, CHECK BOX AT Q.13 ON PAGE 3.]

[IF "NEVER READ" IN Q.3, SKIP TO Q.7.]

6. Other than yesterday, which you've already told me about, I'd like you to tell me whether you, yourself, have read or looked into a weekday copy of the _____ within the past seven days. Let's start with a week ago today -- that is, last [DAY OF INTERVIEW]. Did you read a weekday copy of the _____ on _____? [GO THROUGH EACH DAY OF THE WEEK EXCEPT YESTERDAY.]

YES NO DK

Monday 1 2 3
Tuesday 1 2 3
Wednesday 1 2 3
Thursday 1 2 3
Friday 1 2 3
Saturday 1 2 3

(32-37)

7. Do you or your family get home delivery of any other daily newspapers?

Yes.....1 (48)
No.....2

[ASK EVERYONE:]

8. Were there any other daily newspapers you read or looked into yesterday?

Yes.....1 → ASK Q.9 (49)
No.....2 → SKIP TO Q.10

9. Which other daily newspaper(s) did you read or look into yesterday?

(50-53)
Wall St. Journal.....01
USA Today.....02
New York Times.....03
OTHER [WRITE IN:]

10. What about Sunday editions? Do you or your family get home delivery of the Sunday

Yes.....1 (54)
No.....2

[ASK EVERYONE:]

11. Did you read or look into any part of this past Sunday's

Yes.....1 (55)
No.....2

12. On how many of the last four weekends, if any, did you read or look into a Sunday edition of the

(56)
None.....0
One.....1
Two.....2
Three.....3
Four.....4
Don't know.....5

[READ THIS INTRODUCTION TO EVERYONE:]

The publishes a special once-a-week version of the paper that they call the

[IF RESPONDENT OR FAMILY DOES NOT SUBSCRIBE TO THE IN Q.4 OR Q.5, ASK Q.13. SUBSCRIBERS SKIP TO Q.15.]

[] 13. Have you ever read a copy of that paper?

(57)
Yes.....1
No.....2 — SKIP TO Q.15
Don't know.....3 — SKIP TO Q.15

[ASK IF "YES" IN Q.13:]

14. When was the last time you read a copy of the

(58)
Past week.....1
Past month.....2
Longer ago than
past month...3
Don't know.....4

[ASK EVERYONE:]

15. Whether or not you read it regularly, is a copy of the delivered to your home or apartment?

Yes.....1
No.....2
Don't know.....3

(59)

16. Not counting today, have you read or looked at a local paid weekly newspaper since last [DAY OF INTERVIEW]? I mean a local newspaper printed once a week that ybu have to pay for.

Yes.....1
No.....2
Don't know.....3

(60)

→ SKIP TO Q.19
→ SKIP TO Q.19

[ASK IF "YES" IN Q.16:]

17. Can you recall the name of that newspaper(s)? [WRITE IN NAMES OF PAPERS.]

a. _____

(61-64)

b. _____

[ASK IF ANY PAPER(S) ARE NAMED IN Q.17:]

18. Are any of these paid weekly papers that you read delivered to your home or apartment because you or someone in your household subscribes?

Yes.....1
No.....2
Don't know.....3

ALL ANSWERS
SKIP TO Q.20

(65)

[ASK IF "NO/DON'T KNOW" IN Q.16:]

19. Are any paid weekly papers delivered to your home or apartment because you or someone else in your household has a paid subscription?

Yes.....1
No.....2
Don't know.....3

(66)

[ASK EVERYONE:]

20. Now, I would like to ask you about free weekly newspapers. This could be a newspaper, shopper or "pennysaver" that is delivered free to your home or that you can just pick up free at stores, supermarkets, and so on. For the purpose of these questions, we're not going to be asking about the free newspaper that was mentioned before.

First of all, not counting today, have you read or looked at a free weekly paper since last [DAY OF INTERVIEW]?

Yes.....1
No.....2
Don't know.....3

→ SKIP TO Q.24
→ SKIP TO Q.24

(67)

[ASK IF "YES" IN Q.20:]

21. Which free papers have you read since last [DAY OF INTERVIEW]?

(68-73)

22. Is there anything in that free weekly that you personally find useful or interesting?

Yes.....1 (74)
 No.....2 → SKIP TO Q.24
 Don't know.....3 → SKIP TO Q.24

[ASK IF "YES" IN Q.22:]

23. What is it that you find useful or interesting? [PROBE: Anything else?]

(75-80)

[ASK EVERYONE:]

RESP. NO. (1-4)
 CARD NO. 2 (5)

24. Are any free weekly newspapers delivered to your home or apartment?

(6)

Yes.....1
 No.....2
 Don't know.....3

25. In some communities, buying guides or "traders" — consisting mostly of advertising for only one kind of product, like automobiles or homes are available. Have you ever seen any publications like this in your community?

(7)

Yes.....1
 No.....2 → SKIP TO Q.28
 Don't know.....3 → SKIP TO Q.28

26. Have you ever read or looked into such a publication?

(8)

Yes.....1
 No.....2 → SKIP TO Q.28
 Don't know.....3 → SKIP TO Q.28

27. When was the last time you looked into one?

(9)

Past week.....1
 Past month.....2
 Longer than past month...3
 Don't know.....4

[ASK EVERYONE:]

28. Now I'm going to read some statements which might be used to describe your local daily newspaper and free weekly newspapers. Please tell me whether each statement is more true of the daily newspaper or of the free weekly newspapers. The first one is...[READ EACH STATEMENT]

	DAILY	FREE WEEKLY	NEITHER/ BOTH EQUAL	DON'T KNOW	
a. Tells you what is going on in your community	1	2	3	4	(10)
b. Has the best classified ads for houses and apartments	1	2	3	4	(11)
c. Is most useful for your food shopping	1	2	3	4	(12)
d. Has the best automobile ads for car buyers	1	2	3	4	(13)

[CONTINUES...]

	DAILY	FREE WEEKLY	NEITHER/ BOTH	DON'T EQUAL KNOW	
e. Tells you more of what is going on outside your community	1	2	3	4	(14)
f. Has the best help-wanted and employment ads	1	2	3	4	(15)
g. Has the best coverage of your local school board	1	2	3	4	(16)
h. Has the best cents-off food coupons	1	2	3	4	(17)
i. Is the best place to look for information on local stores and services	1	2	3	4	(18)

29. Suppose you were thinking of buying some clothing and wanted to look at some ads for styles, prices, brands, what's available locally, and so on. Please tell me which of the two--the daily newspaper or the free weekly paper--would be a better source of shopping information on clothing? [RECORD BELOW.] What about...[CONTINUE WITH EACH ITEM.]

	DAILY	FREE WEEKLY	NONE/BOTH EQUALLY	DON'T KNOW	
a. Clothing items	1	2	3	4	(19)
b. A new TV set	1	2	3	4	(20)
c. Living room furniture	1	2	3	4	(21)
d. Carpeting	1	2	3	4	(22)
e. Small kitchen appliances	1	2	3	4	(23)

Finally, I'd like to ask you a few questions just for classification purposes. First...

30. How long have you been living in this area? (24)

Less than 1 year.....1
 1-2 years.....2
 3-5 years.....3
 6-9 years.....4
 10 + years/all my life...5
 REFUSED.....6

31. What was the last grade of school or year of college you completed? (25)

Less than high school grad...1
 High school graduate.....2
 1-3 years of college.....3
 College graduate.....4
 Postgraduate study.....5
 REFUSED.....6

32. Just as a rough guess, how much would you say your household spends per week on groceries? [READ LIST:] (26)

Less than \$50.....1
 Between \$50 and \$75.....2
 Between \$76 and \$100.....3
 More than \$100.....4
 [DO NOT READ:] DON'T KNOW/REFUSED.....5

33. In which of the following age groups does your age fall? [READ LIST:]

18-24 1
25-29 2
30-34 3
35-44 4
45-54 5
55-64 6
65 years or older.....7

(27)

[DO NOT READ:]

REFUSED.....8

34. Are you currently married, divorced, widowed or separated, or have you never been married?

(28)

Married.....1
Divorced.....2
Widowed.....3
Separated.....4
Never married/single.....5
REFUSED.....6

35. Last week, were you working full time, part-time, going to school, keeping house, or what?

(29)

Working full-time.....1
Working part-time.....2
Unemployed, laid off, looking
for work.....3
Retired.....4
In school/student.....5
Keeping house/homemaker.....6
Other [SPECIFY:].....7

REFUSED.....8

36. Including yourself and any children or babies, how many people are living in your home?

(30)

[WRITE IN NUMBER:] _____

37. Including yourself, how many people contribute to the household income — from their earnings or any other source?

(31)

[WRITE IN NUMBER:] _____

38. Which of these categories best describes your total household income before taxes, for 1985? [READ CATEGORIES:]

(32)

Under \$10,000.....1
\$10,000 - \$14,999.....2
\$15,000 - \$24,999.....3
\$25,000 - \$34,999.....4
\$35,000 or more.....5

[DO NOT READ:]

REFUSED.....6

39. RECORD SEX:

Male.....1
Female.....2

(33)

THANK THE RESPONDENT AND RECORD NAME, ADDRESS, CITY AND STATE. IF THE RESPONDENT WILL NOT GIVE ADDRESS, ASK SPECIFICALLY FOR THE ZIP CODE.

RESPONDENT NAME: _____

ADDRESS: _____

CITY: _____

STATE: _____

ZIPCODE: _____

A8600-8.35 U

4/87

KEY FACTS 1987:

Newspapers, Consumers, Advertising



Newspaper Advertising Bureau, Inc.

1180 Avenue of the Americas
New York, New York 10036
212 921-5080

KEY FACTS 1987:
NEWSPAPERS, CONSUMERS, ADVERTISING

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers.

April 1987

Newspaper Advertising Bureau, Inc.

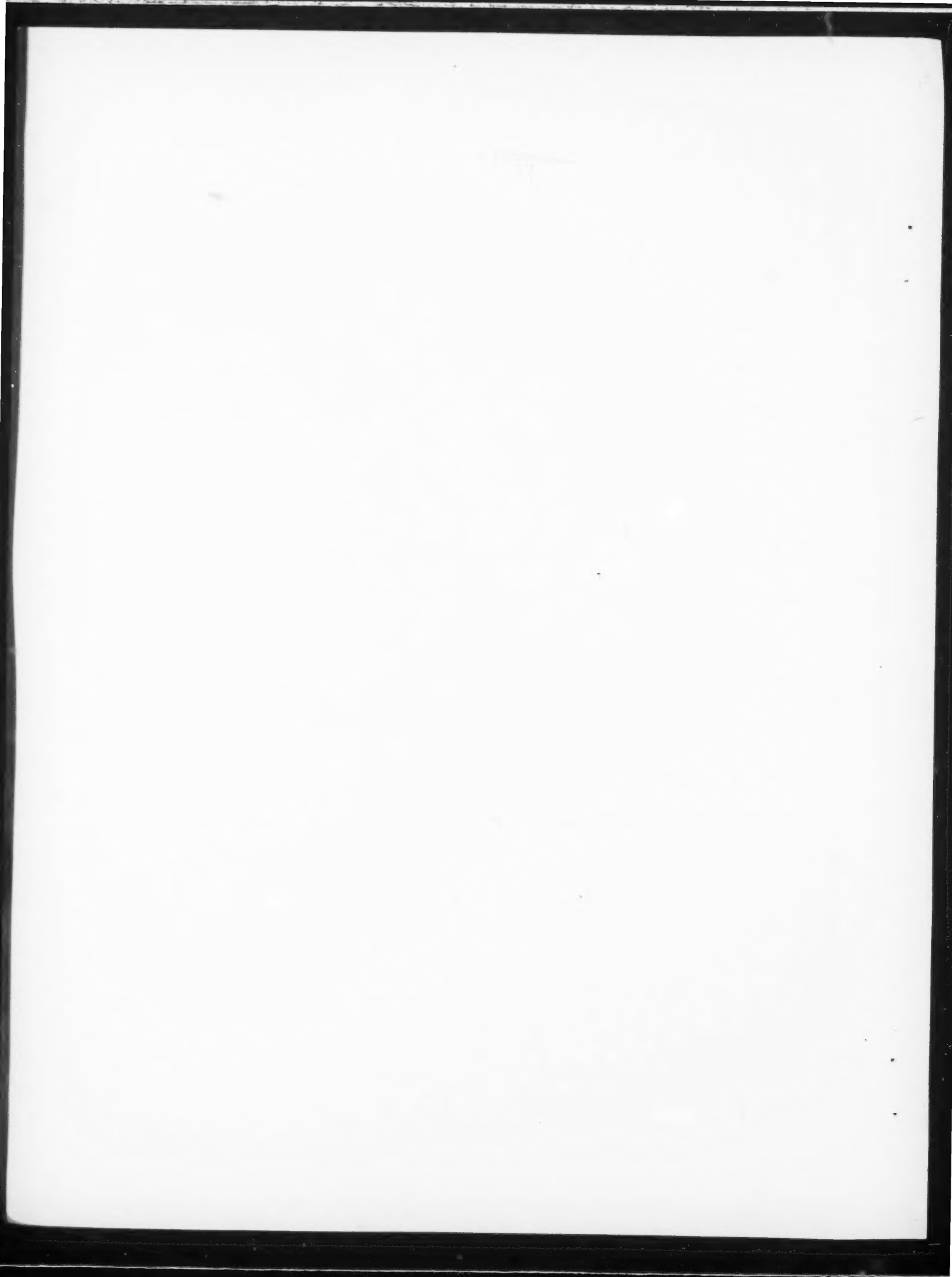
How To Use Key Facts

The main purpose of this report compiled from many sources is to answer some of the most frequently asked questions about newspapers, consumers, and advertising.

The report is designed as a reference source, not as an account to be read through page by page. To maximize its reference value, the table of contents organizes specific items of information under general headings such as "Advertising Costs" and "Newspaper Circulation".

For example, information on daily newspaper reach and frequency comes under the general heading of "Newspaper Readership", where it is listed as "Reach and Frequency: Typical Five-Day Patterns for Daily Newspapers at Varying Levels of Penetration".

The scope of the material is necessarily limited. For answers to other questions about newspapers and advertising, consult the heading "NAB Telephone Directory".



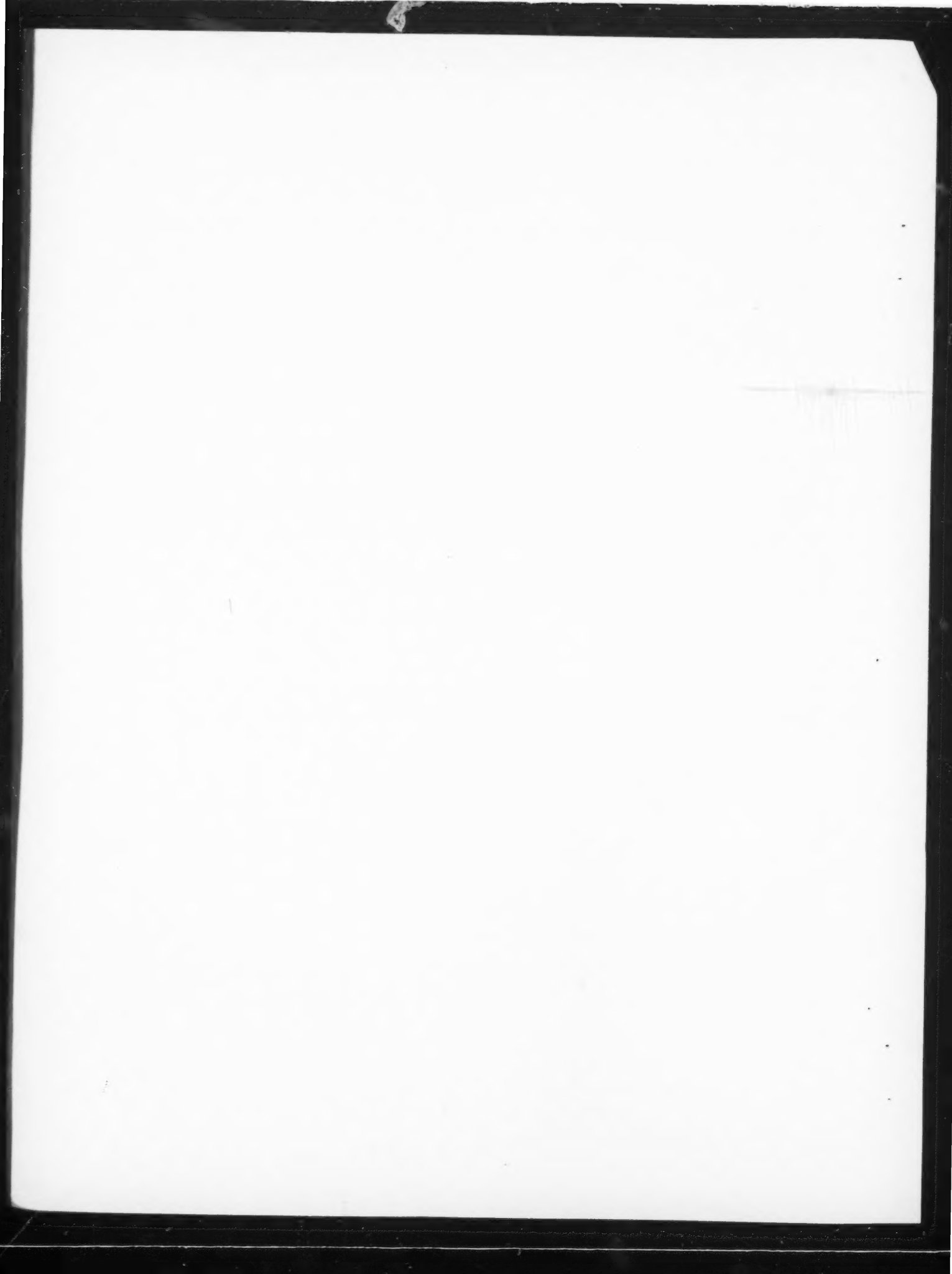
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Telephone Directory - Newspaper Advertising Bureau

Ad readership	Stu Tolley	704-4562
Advertising expenditures	Jim Conaghan	704-4558
Advertising rates	Jim Conaghan	704-4558
Automotive sales	Val Corradi	(313) 642-9200
CAN DO	Susan Lorenzana	704-4555
Color (ROP)	Charles Kinsolving	704-4544
Competitive media	Tom Fitzpatrick	704-4551
Co-op sales (NCN)	Frank Hennessey	(312) 644-1290
Coupon information	Chuck Lehman	704-4564
Food, supermarkets	Bob Gaines	704-4540
Information center	Ann Brady, Susan Hyer	704-4549
Inserts, preprints	Jack Aldinger, Ted Knecht	704-4520/1
Intermedia cost estimates	Uldis Grava	704-4550
Marketing services	Uldis Grava	704-4550
Membership information	Bill Solch	704-4530
National sales	Jim Wilson	704-4503
Newspaper circulation	Jim Conaghan	704-4558
Newspaper features/sections	Chuck Lehman	704-4564
Newspaper readership	Chuck Lehman	704-4564
NEWSPLAN	Jim Wilson	704-4503
New technology	Charles Kinsolving	704-4544
One Order/One Bill	Jack Aldinger, Ted Knecht	704-4520/1
Public Relations	Jim Dunaway	704-4547
Real Estate classified	Tony Marsella	704-4516
Recruitment advertising	Ira Gordon	704-4515
Retailing	Alfred Eisenpreis	704-4535
SAU TM (Standard Adv. Units)	Charles Kinsolving	704-4544
SMRB (Simmons) data	Chuck Lehman	704-4564
Telemarketing	Kitty Vance	704-4513
Total market coverage	Jack Aldinger	704-4521

(Unless otherwise stated, area code is 212.)

New York Office	(212) 921-5080
Chicago Office	(312) 644-1290
Detroit Office	(313) 642-9200
Georgia Office	(404) 949-4833
Los Angeles Office	(213) 480-0452
San Francisco Office	(415) 981-8118

NAB Services: New Technology

The oldest advertising medium in the United States is one of the most advanced in technological applications. Newspapers have launched a variety of electronic information services. Computerization and satellites have transformed every aspect of newspaper production. And electronic pressroom equipment is revolutionizing run-of-paper (ROP) color reproduction.

The New Technology department works closely with advertisers, agencies and newspapers to develop programs to make newspapers a more attractive, more economical, and easier-to-buy medium. The department is now focusing on improving ROP color reproduction and the standardization of newspaper special sections (e.g., TV logs).

The department also works closely with the Technical Committee of ANPA, the 4As and other organizations to track key developments in the new technologies, and their implications for the newspaper business.

Particular areas of interest of the department include:

Standardization	Public Access Videotex
ROP Color	Personal Computer Market
Satellite Transmission (AD/SAT)	Cable TV
Electronic Information Services	Electronic Newspaper Libraries
Remote Entry	

For more information on New Technology department activities, call Debbie Spitaletta at (212) 704-4542.

NEWSPLAN: Discounts for Continuity

ONE PROGRAM:

NEWSPLAN's purpose is to make national and regional advertising more effective by giving it the believability, immediacy and selling impact of ROP newspaper advertising at lower cost and greater convenience.

THREE BENEFITS:

Discounts - lower cost for the advertiser

By planning ahead, you can earn discounts from 10% to 30% or more with NEWSPLAN. Plan your advertising on an annual basis to make sure your cumulative space—in column inches or modular units—equals 6 pages, 13 pages or 52 pages. Discounts at these page levels are in effect in over 1,000 newspapers representing 82% of total U.S. circulation.

SAUsTM - simplified specs for the creative department

Thanks to Standard Advertising Units accepted by nearly 1,600 daily newspapers (98% of total circulation) one finished mechanical now covers all the newspapers in your schedule in most cases. (See pages 10, 11 and 12 for more details.)

CAN DO - better audience data for marketers and planners

CAN DO gives you net reach and frequency data for any daily or Sunday newspaper schedule and any geographic area, down to the county level. Audience figures can be run by sex, age, household income or household size. CAN DO computer runs are available through your own terminal if you are an IMS subscriber, or through NAB at cost.

For more information on NEWSPLAN, call Jim Wilson at (212) 704-4503.

Research Information on Consumers and Readers

Newspaper Advertising Bureau supports an active research program. The Research Department uses a variety of custom surveys, syndicated research and secondary sources to meet the needs of advertisers, advertising agencies and member newspapers. As of January 1987, the Research Department's list of in-print publications numbers more than 70 reports, brochures and research notes.

The subject areas covered include:

- newspaper readership and audience data,
- ad readership,
- classified advertising,
- competitive media,
- retail shopping,
- sales effects of advertising.

Reports can be obtained through member newspapers. A current list of in-print research publications is available on request. For more information, call Audrey Townsend at (212) 704-4565.

ANNUAL REPORTS PREPARED BY ECONOMIC AND MEDIA ANALYSIS UNIT,
NEWSPAPER ADVERTISING BUREAU

1. Total advertising volume in the U.S., 1935-1985 (McCann-Erickson)
2. Newspaper advertising expenditures, 1945-1985. National, Retail and Classified
3. U.S. Daily and Sunday newspapers - 1945 to present - Number and Circulation
4. How much do people spend to read daily and Sunday Newspapers? 1945 to present
5. National advertising expenditures in measured media by classification
6. Daily newspapers in 317 MSAs: Households, coverage, circulation, column inch rate, cost of SAU quarter page, SAU half page and full page
7. Daily newspapers in 212 ADIs: Households, coverage, etc.
8. Sunday newspapers in 317 MSAs: Households, coverage, etc.
9. Sunday newspapers in 212 ADIs: Households, coverage, etc.
10. Daily newspapers in 317 MSAs: ROP color edition
11. Daily newspapers in 212 ADIs: ROP color edition
12. Cumulative circulation and rates of daily newspapers in 316 MSAs necessary to obtain 60% household coverage in each market
13. Cumulative circulation and rates of daily newspapers in 212 ADIs necessary to obtain 60% household coverage in each market
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20. ROP color premium in 317 MSAs: by 100 markets - 1, 2, and 3 colors
21. Daily and Sunday newspapers with zone editions
22. Cities in the U.S. with two or more newspapers
23. Newspapers in the U.S. not accepting beer, wine or liquor advertising
24. Media breakdown of U.S. agencies billing \$30 million or more
25. Newspapers not offering a 2% cash discount

Inquiries: Research Department, (212) 704-4611, -4612

CAN DO: Audience Data for Daily and Sunday Newspapers

The Newspaper Advertising Bureau's CAN DO program can:

- produce detailed audience data for any list of daily and Sunday newspapers

- provide data customized to any geographic or selected demographic definition

- calculate reach, frequency, and frequency distribution estimates

- allow media mix analyses through IMS data base for other media

- deliver data output via an on-line computer system

CAN DO uses county building blocks to estimate audiences for all MSAs, ADIs, DMAs or customized areas constructed on whole county lines. And CAN DO provides estimates for the most important audience breaks—age, sex income, and household size.

If you wish to provide us with the total cost per insertion, CAN DO will give you specific cost-per-thousand information on your newspaper audience.

For further information, contact Susan Lorenzana at (212) 704-4555.

Where to Obtain Rate Information

Current information on ROP rates for daily and Sunday/weekend newspapers is available from the Media Analysis Unit of NAB. Contact Jim Conaghan at (212) 704-4558.

Through NAB's NEWSPLAN, over 1,000 newspapers with more than 82% of total weekday circulation offer discounts to national and regional advertisers who place ROP column inches or modular units equal to six or more pages per year. For more information, contact Jim Wilson at (212) 704-4503.

Current information on rates for preprints and inserts is available from Jack Aldinger at (212) 704-4521 or Ted Knecht at 704-4520.

Among the Media Analysis Unit reports that include rate information are the following:

MSA METROPOLITAN MARKETS BY HOUSEHOLDS (317 MSAs)

United States markets ranked by number of households in MSA. Lists all newspapers with at least .05 ratio of circulation to households or more than 25,000 circulation. Includes circulation-to-household ratios; metro and total circulation; inch rates; and cost of SAU quarter page, half page and full page. Published separately for weekday and Sunday/weekend editions.

ADI MARKETS BY HOUSEHOLDS (212 ADIs)

Comparable information, ranked by number of households in Area of Dominant Influence rather than by Metropolitan Statistical Area.

CUMULATIVE CIRCULATION AND RATES OF DAILY NEWSPAPERS IN 317 MSAs
NECESSARY TO OBTAIN 60% HOUSEHOLD COVERAGE IN EACH MARKET

(For complete list of annual reports prepared by Economic and Media Analysis Unit of NAB, see page 5.)

NAB's One-Order/One-Bill Newspaper Placement Service

This service is set up to provide advertisers and agencies with all the information needed to plan and execute any type of multi-newspaper ROP or insert program, including costs, specifications and availabilities. For estimates and information, call Jack Aldinger or Ted Knecht at (212) 704-4520/21. They will handle all paper work, make reservations, issue insertion orders, provide proof-of-performance tearsheets and forward payment to every newspaper on the schedule, billing you on one invoice.

Free-Standing Insert Options

Today inserts can be distributed in nearly every daily and Sunday newspaper in the United States. Circulation achieved is more than 57 million daily and 59 million Sunday. Over 50% of all Sunday editions can distribute an insert in less than their full-run circulation, and more than 75% will accept a product sample attached to an insert. A similar proportion will accept an envelope, either empty or containing inserts or coupons.

Sizes are almost limitless. You can make an insert as large as anything that fits into the newspaper when folded, to 11" x 13", or as small as 5" x 7". Formats are equally varied: from a single page to a booklet of 96 pages or more. Inserts can be long or short and can include flaps, gatefolds, reply cards, coupons, perforations, fragrances, etc. Inserts can be printed on all types of paper, from ordinary newsprint to super-coated card stock.

Newspaper Co-op Network (NCN)

With just one call to Newspaper Co-op Network, manufacturers and advertising agencies can easily place dealer listing co-op ads in any number of markets. Through NCN, you can coordinate your local message with your national brand awareness advertising—and still include local dealer listings in each market. You place only one order and get one bill—NCN DOES ALL THE WORK!

NCN is a total marketing package that dramatically increases vertical movement. Here are ten of NCN's unique advantages:

- FACT 1 One Order/One Bill makes newspapers easy to use for co-op and eliminates the hassle of multiple orders and invoices.
- FACT 2 NCN is cost efficient—It eliminates administration costs and insures the best possible rates available for dealer list co-op advertising.
- FACT 3 Stimulates local retailer involvement and produces new retail single-signature advertising.
- FACT 4 Flexibility—Tailors newspaper coverage to your needs for any combination of regular or test markets.
- FACT 5 Creative control—Advertiser controls both graphics and content.
- FACT 6 Guaranteed timing—Direct placement when and where you want it.
- FACT 7 Localized monitoring—Provides a new measurement tool. National Sales Manager now evaluates local market dealer penetration.
- FACT 8 Customization—Dovetails ad coverage with local representatives' sales areas or distributor/wholesaler territories.
- FACT 9 Specialization—Trouble-shooting capability to solve immediate marketing problems, market by market.
- FACT 10 Free sales help!—NCN's newspaper co-op managers act as an extension of your own sales force. (Newspapers have more than 26,000 retail sales people in the field.)

Best of all, NCN WORKS! Ask us for success stories. For more information on NCN, call Frank Hennessey at (312) 644-1295.

Standard Advertising Units (SAUs)TM

The Standard Advertising Unit system simplifies the production and placement of newspaper advertising. The expanded SAUTM system introduced on July 1, 1984 received the endorsement of AAAA, ANPA, INAME, NAB and other organizations. Practically every daily newspaper in the U.S. accepts SAUs.

Broadsheet newspapers in full compliance with the system have a 6-column format for display advertising, a 13-inch printed page and a standard column width of 2 1/16 inches. Measurement and billing of advertising is based on the standard column inch.

Most tabloids have adopted a 5-column format with the same column width as broadsheets. There are special provisions for short cut-off tabloids. (The expanded SAUTM format chart on page 11 depicts 53 of the 57 advertising sizes developed, including the N size for short cut-off tabloids. The remaining four sizes are all double trucks, as noted.)

For more information or a full-scale SAUTM format chart, call Charles Kinsolving at (212) 704-4544.

(Effective July 1, 1984)

The Expanded **SAU**TM Standard Advertising Unit System (Effective July 1, 1984)

Depth
in
feet

1 COL 2 1/2 MB

2 COL 4-1/4"

3 COL 6-7/18

4 COL 8-3/8"

9 COL 10 13/14

6 COL 13

10

FD'	1aFD'	2aFD'	3aFD'	4aFD'	5aFD'	6aFD'
18"	1a18	2a18	3a18	4a18	5a18	6a18
15 75"	1a15.75	2a15.75	3a15.75	4a15.75	5a15.75	
14"	1a14	2a14	3a14	4a14	5a14	6a14
13"	1a13	2a13	3a13	4a13	5a13	
10.5"	1a10.5	2a10.5	3a10.5	4a10.5	5a10.5	6a10.5
7"	1a7	2a7	3a7	4a7	5a7	6a7
5.25"	1a5.25	2a5.25	3a5.25	4a5.25		
3.5"	1a3.5	2a3.5				
3"	1a3	2a3				
2"	1a2	2a2				
1.5"	1a1.5					
1"	1a1					

- 1 Column 2-1/16"
2 Columns 4 1/4"
3 Columns 6-7/16"
4 Columns 8 5/8"
5 Columns 10-13/16"
6 Columns 13"

Double Truck 26 $\frac{3}{4}$ "
(There are four suggested double truck sizes.)

13x10	13x18
13x14	13x10.5

Newspaper Advertising Bureau, Inc.
485 North Dearborn Street, Suite 1400, Chicago, IL 60610-3999
Tel: 312/329-7000 Fax: 312/329-7001

FD (Full Depth) — In a
on deeper layers for both 1/2 inch and
concrete, one inch and on the other
3/4 inch and 1/2 inch. 1/2 inch and 1/4
concrete is the average 1/2 inch and that
from each of these depths is greater than 1/2

[illegible]

Fractional Pages: Column Inch Equivalents,
With Standard Advertising Unit Options

Broadsheet

Full page = 126 column inches

6 x 21 (full depth)

Two-thirds page = 84 column inches

4 x 21 (full depth)

6 x 14

Half page = 63 column inches

3 x 21 (full depth)

4 x 15.75

6 x 10.5

One-third page = 42 column inches

2 x 21 (full depth)

3 x 14

4 x 10.5

6 x 7

Quarter page = 31.5 inches

2 x 15.75

3 x 10.5

One-sixth page = 21 column inches

1 x 21 (full depth)

2 x 10.5

3 x 7

4 x 5.25

Tabloid*

Full page = 70 column inches

5 x 14

Four-fifths page = 56 column inches

4 x 14

Three-fifths page = 42 column inches

3 x 14

4 x 10.5

Half page = 35 column inches

5 x 7

Two-fifths page = 28 column inches

2 x 14

4 x 7

One-fifth page = 14 column inches

1 x 14

2 x 7

One-tenth page = 7 column inches

1 x 7

2 x 3.5

* May not apply to the New York Daily News, Newsday and other short cut-off tabloids. Consult individual newspaper for equivalents.

Estimating Intermedia Advertising Costs

Media planners often need to compare the cost of various advertising media. One approach to the problem is to use common universe standards as a media base. The Area of Dominant Influence* (ADI) is a geographic unit that lends itself to this purpose, since the 212 ADIs account for the total land area of the United States.

Intermedia cost estimates can be expressed in terms of households or standard demographic age/sex cells because current figures are available for both broadcast and newspapers. Since major advertisers and agencies are usually concerned with advertising schedules rather than single insertions, the logical measure for potential exposure is Gross Rating Points (GRPs).

The table on page 14 illustrates how GRPs can be used for intermedia comparisons, in this case between TV and newspapers. This table compares the cost-per-household GRP of the quarter-page newspaper space unit (31.5 column inches) with the 30-second commercial unit. The TV daypart used is prime because this is the time period offering a large dual audience, most comparable in size and composition to newspapers.

The figures shown represent a conservative estimate at national open rates, used in the initial stage of setting up a media plan. A final plan specifying particular TV programs and newspapers (with local or earned volume discounts) would show better efficiencies in cost-per-thousand audience delivery.

For further details contact Uldis Grava at (212) 704-4550.

* This statement applies to the Designated Market Area (DMA) as well.

Newspaper vs. Television: Top 20 ADI Markets
HH Universe and Cost/HH GRP Comparison

<u>ADI Market</u>	<u>HH (000s)</u>	<u>30 second Primetime Spot TV Cost/HH GRP</u>	<u>31.5 inches Daily Newspapers Cost/HH GRP</u>
1. New York	6,870	\$557	\$624
2. Los Angeles	4,612	\$593	\$426
3. Chicago	3,090	\$270	\$299
4. Philadelphia	2,655	\$229	\$240
5. San Francisco	2,105	\$300	\$231
6. Boston	2,048	\$284	\$220
7. Detroit	1,695	\$151	\$210
8. Dallas/Ft. Worth	1,572	\$232	\$172
9. Washington, DC	1,551	\$158	\$174
10. Houston	<u>1,432</u>	<u>\$228</u>	<u>\$115</u>
Total: Top 10	27,630	\$3,002	\$2,711
11. Cleveland	1,428	\$103	\$112
12. Atlanta	1,203	\$145	\$132
13. Pittsburgh	1,224	\$112	\$140
14. Miami	1,189	\$188	\$162
15. Minneapolis/St. Paul	1,199	\$123	\$145
16. Seattle/Tacoma	1,213	\$156	\$118
17. Tampa/St. Petersburg	1,070	\$124	\$ 89
18. St. Louis	1,059	\$ 92	\$101
19. Denver	1,023	\$107	\$ 94
20. Sacramento	<u>968</u>	<u>\$ 93</u>	<u>\$108</u>
Total: Top 20	39,206	\$4,245	\$3,912

Sources: Media Market Guide, 1st Qtr 1987; PEP Media Database, Spring 1987

A Few Common Newspaper Terms

AD/SAT TM	The Satellite Network for Advertising Delivery provides high-resolution facsimile transmission newspaper advertising, by satellite, in minutes.
Broadsheet:	A "standard" or large-size newspaper. In July 1984, most broadsheet dailies adopted a uniform, 13-inch printed page width and a full depth of 21" or deeper, up to 22 1/2".
Circulation:	The number of copies sold or distributed. For the more than 90% of weekday circulation audited by the Audit Bureau of Circulation, the term always denotes <u>paid</u> circulation.
Color scanner:	Electronic equipment that automatically produces separations for ROP process (or "full") color.
Column inch:	Space measurement one column wide and one inch deep. (See "SAUs", pp 10,11,12.)
Double truck:	Two facing pages used for a single unbroken advertisement. Also called a two-page spread.
Facsimile transmission:	The electronic transmission of a page image (usually to printing plants at other sites).
Front-end system:	A total computer system for text entry, editing, formatting and/or billing, for editorial, display advertising and/or classified advertising.
Newsprint:	The uncoated, machine-finished paper used for printing newspapers.
Pagination system:	A computerized makeup system for composing whole pages of type, line art and halftones.
ROP ("run-of-paper"):	ROP is a term generally applied to ads that appear on a newspaper page (as distinguished from inserts or preprints).
Scotch double truck:	A single unbroken advertisement on two facing pages bordered by one full column of editorial on each of its vertical sides and by shallow columns of editorial across the top.
Tabloid:	A newspaper with a smaller page size than a broadsheet. A full tabloid page is usually 14 inches deep. The width varies from 9 3/8" ("short cut-off") to 10 13/16" ("long cut-off").

How Newspaper Advertising Works

The daily newspaper is a unique advertising medium that readers value as a useful source for many kinds of information. The most common way of reading the paper is to start with the front page and go through the issue page by page, scanning it for articles and ads that look "interesting". Readers know the difference between editorial content and advertising, but in practice they don't pay much attention to this distinction.

The human eye's efficiency as a scanning device makes it easy for readers to find the articles and ads they want to read. As a result, interest in newspaper ads is highly correlated with buying interest:

<u>Average Interest Level in Newspaper Ads</u> (by Prospect Status)	
<u>Prospects:</u>	<u>Interest</u> <u>in Ad</u>
I ("hottest" prospects)	87%
II	75
III	47
<u>Non-prospects:</u>	
IV	48%
V	37
VI ("coldest" non-prospects)	14

Source: Newspaper Advertising Bureau collation of surveys by individual newspapers, 1985-1986.

This close link between prospect status and interest in advertising may seem self-evident, but it does not necessarily hold for other media in which advertisers depend on novelty, humor or celebrity presenters to attract the consumer's attention.

Editorial Environment: Newspaper Sections and Features

The daily and Sunday newspaper provide varied editorial environments to meet the needs of almost any advertiser. On request, more than eight out of ten U.S. newspapers will position advertising near appropriate content, usually without charge.

A 1986/87 survey of newspapers enables NAB to supply a computerized list of newspapers that regularly carry a specific section or feature. This list, alphabetized by state and by city within state, tells which days of the week the section or feature runs, as well as the newspaper's policy on positioning.

SECTIONS on which information is available include:

Business, Finance	Lifestyle, Women
Entertainment	Science
Fashion	Sports
Food	TV, Radio
Home	Travel

FEATURES (partial listing):

Advice on personal finance	Fashion, women	Pets
Astrology	Fashion, teenage	Physical fitness
Automotive	Games and puzzles	Real estate
Beauty	Gardening	Recipes
Best food buys	Health and medical	Religion
Books	Home repair, building	Restaurants
Business, financial	Home furnishings	Science
Career advice	Movie timetable	Stamps, coins
College	Music, records, tapes	Theater
Computers (personal)	Op Ed page	Travel & resort
Diet, nutrition	Outdoors: camping, etc.	Weather map
Fashion, men	Personal advice	Wine

For information, call Chuck Lehman at (212) 704-4564.

Kinds of Newspaper Items and Advertising "Usually Read"
(by sex)

<u>Editorial</u>	<u>Total Adults</u>	<u>Men</u>	<u>Women</u>
News about local community	89%	87%	90%
News about economy, jobs, inflation	86	89	83
International or world news	84	88	80
News about President, Congress	78	82	75
News briefs, summary of news	77	79	76
News about local politics, gov't.	74	77	72
News about celebrities	71	65	77
TV program listings	67	65	70
Advice columns	65	46	81
Calendar of local events	61	57	65
Letters to the editor	60	57	63
Food pages	59	33	81
Editorials, editor's opinions	58	58	58
Comic strips, "funnies"	57	61	55
Obituaries	53	46	59
Sports news: local schools	51	63	40
Business and financial news	50	60	41
Sports news: professional teams	49	71	29
Political opinion columns	47	52	43
Book reviews	29	24	33
Crossword puzzles	23	19	27
<u>Advertising</u>			
Supermarket ads	64%	45%	80%
Store ads for clothing	62	46	76
Classified or want ads	60	64	57
Movie ads	56	56	55

Base: Total newspaper readers = 100% (1,803) (837) (966)

Source: Audits & Surveys, Inc, 1982

Question: Each of these cards contains a different kind of news, feature or advertising item appearing in most daily newspapers. Please look through them and put to one side the kinds of things you don't usually read or look at.

The best newspaper readers are also the best customers for many products and services.

A Profile of the Average Weekday Audience

<u>Demographic Segment</u>	<u>Percent Coverage</u>	<u>Index*</u>
HH income \$60,000 or more	77½	123
College graduate	77	122
HH income \$50,000 or more	77	122
Own home valued at \$100,000 or more	76	121
Manager, administrator	75	119
HH income \$40,000 or more	75	119
Professional	75	118
Own home valued at \$70,000-\$99,999	73	116
Age 55-64 years	73	116
HH income \$30,000 or more	73	115
Northeast Census region	72	114
HH income \$30,000 - \$39,999	69	109
Own home valued at \$50,000-\$69,999	69	109
One-three years college	69	109
Technical/clerical/sales occupation	68	109
Age 45-54 years	68	108
Suburban resident	67	107
County size B resident	67	106
Midwest Census region	66	105
Age 35-44 years	66	105
Two-person household	65	104

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

* Average weekday coverage of total adults = 100.

Daily Newspaper Audience
(Average Weekday)

	<u>Number</u> (millions)	<u>Percent of</u> <u>Population</u> (Coverage)	<u>Percent of</u> <u>Audience</u> (Composition)
<u>Total Adults</u>	<u>107.8</u>	<u>63%</u>	<u>100%</u>
By sex:			
Men	52.6	65%	49%
Women	55.2	61	51
By age:			
18-24 years	14.8	53%	14%
25-34 years	23.5	58	22
35-44 years	20.4	66	19
45-54 years	15.3	68	14
55-64 years	16.2	73	15
65 years or older	17.6	65	16
By education:			
College graduate	22.5	77%	21%
1-3 years college	21.0	69	20
High school graduate	43.6	65	40
Some high school or less	20.7	47	19
By household income:			
\$60,000 or more	11.7	77%	11%
\$50,000 or more	18.4	77	17
\$40,000 or more	32.3	75	30
\$30,000 - \$39,999	18.5	69	17
\$20,000 - \$29,999	23.1	64	21
\$10,000 - \$19,999	22.3	57	21
Under \$10,000	11.5	44	11
By occupation:			
Professional, manager	19.9	75%	19%
Technical, clerical, sales	22.6	68	21
Precision, craft	8.4	57	8
Other employed	17.2	58	16
Not employed	39.7	59	36

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

Sunday/Weekend Newspaper Audience
(Average Sunday/Weekend)

	<u>Number</u> (millions)	<u>Percent of</u> <u>Population</u> (Coverage)	<u>Percent of</u> <u>Audience</u> (Composition)
<u>Total Adults</u>	<u>109.8</u>	<u>64%</u>	<u>100%</u>
By sex:			
Men	52.3	65%	48%
Women	57.5	64	52
By age:			
18-24 years	15.9	57%	15%
25-34 years	26.0	64	23
35-44 years	20.7	67	19
45-54 years	15.0	67	14
55-64 years	15.4	70	14
65 years or older	16.7	62	15
By education:			
College graduate	23.4	80%	21%
1-3 years college	22.0	72	20
High school graduate	44.2	66	40
Some high school or less	20.2	46	19
By household income:			
\$60,000 or more	12.2	81%	11%
\$50,000 or more	19.1	80	17
\$40,000 or more	34.1	79	31
\$30,000 - \$39,999	19.5	72	18
\$20,000 - \$29,999	23.3	64	21
\$10,000 - \$19,999	21.8	56	20
Under \$10,000	11.1	42	10
By occupation:			
Professional, manager	20.7	77%	19%
Technical, clerical, sales	23.6	71	22
Precision, craft	9.0	61	8
Other employed	16.9	57	15
Not employed	39.6	59	36

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

The Reading of Daily Newspapers

Average number of times read or looked at and
average time spent reading dailies yesterday
by day of the week and number of papers read*

	Avg. No. Times Read/Looked at <u>Newspaper</u>	Avg. Time Spent Reading <u>(minutes)</u>
<u>Monday</u>		
Read one daily	1.5	38
Read two or more dailies	3.0	61
<u>Tuesday</u>		
Read one daily	1.5	40
Read two or more dailies	2.7	59
<u>Wednesday</u>		
Read one daily	1.5	38
Read two or more dailies	3.1	59
<u>Thursday</u>		
Read one daily	1.6	42
Read two or more dailies	3.2	72
<u>Friday</u>		
Read one daily	1.6	39
Read two or more dailies	2.8	58
<u>All Yesterday Readers</u>	<u>1.8</u>	<u>44</u>
(Total N = 1,352)		

- * Audits & Surveys, Inc, 1982: National sample of 1,979 adults interviewed in person about "yesterday's" newspaper reading. Interviews were equally distributed across the week, Tuesday through Saturday; "yesterday reading" behavior was probed for three dayparts.

Source: Newspapers in American News Habits,
Newspaper Advertising Bureau, 1986.

Page Opening:
Daily Newspaper Pages or Sections Usually Read
(Total adult readers, by sex)

	<u>Percent of Weekday Audience:</u>		
	<u>Adults</u>	<u>Men</u>	<u>Women</u>
Usually read every page	63½	63½	62½
Read certain pages or sections	37	37	38
Business, finance	76	78	74
Classified	76	76	76
Comics	76	76	77
Editorial page	78	77	79
Food, cooking	77	71	82
General news	92	92	93
Home furnishings, gardening	74	71	78
Sports	80	88	72
TV, radio listings	76	75	78
Projected base:			
Average weekday audience (in 000s)	(107,753)	(52,597)	(55,156)

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

For details on other demographic segments, see:
Daily Newspaper Page Opening: Pages and Sections Usually Read,
Newspaper Advertising Bureau, 1987.

Reach and Frequency: Typical Five-Day Patterns
for Daily Newspapers at Varying Levels of Penetration

<u>One Issue Reach:</u>	<u>Number of Weekday Issues:</u>			
	<u>Two</u>	<u>Three</u>	<u>Four</u>	<u>Five</u>
<u>15%</u> Reach	19%	22%	23%	25%
Average Frequency	1.6	2.1	2.6	3.1
<u>20%</u> Reach	26%	29%	31%	33%
Average Frequency	1.6	2.1	2.6	3.1
<u>25%</u> Reach	32%	36%	39%	41%
Average Frequency	1.6	2.1	2.6	3.1
<u>30%</u> Reach	38%	43%	46%	48%
Average Frequency	1.6	2.1	2.6	3.1
<u>35%</u> Reach	45%	50%	54%	56%
Average Frequency	1.6	2.1	2.6	3.1
<u>40%</u> Reach	51%	57%	61%	64%
Average Frequency	1.6	2.1	2.6	3.1
<u>45%</u> Reach	58%	64%	68%	71%
Average Frequency	1.6	2.1	2.6	3.2
<u>50%</u> Reach	64%	71%	75%	78%
Average Frequency	1.6	2.1	2.7	3.2
<u>55%</u> Reach	70%	78%	82%	85%
Average Frequency	1.6	2.1	2.7	3.2
<u>60%</u> Reach	77%	84%	88%	91%
Average Frequency	1.6	2.1	2.7	3.3

Note: These estimates assume a turnover rate of 28%, which is average for metropolitan newspapers. Turnover rates, which are determined by the ratio of the two-issue reach to the one-issue reach, range from about 16% to 36%. Since the reach and frequency patterns for individual newspapers vary, these estimates should be used only in the absence of local data.

Source: Audits & Surveys, Inc.;
Newspaper Advertising Bureau.

Number of Daily and Sunday Newspapers in the United States

<u>Year</u>	<u>Morning</u>	<u>Evening</u>	<u>All Day</u>	<u>Total Daily</u>	<u>Sunday</u>
1983	417	1,255	29	1,701	772
1984	431	1,230	27	1,688	783
1985	456	1,196	26	1,678	798

Circulation of Daily and Sunday Newspapers in the United States
(in millions)

<u>Year</u>	<u>Morning</u>	<u>Evening</u>	<u>Total Daily</u>	<u>Sunday</u>
1983	33.8	28.8	62.6	56.7
1984	35.4	27.7	63.1	57.6
1985	36.4	26.5	62.9	58.8

(Circulation of all-day newspapers is apportioned between "Morning" and "Evening".)

1985 Newspaper Data for Canada

	<u>Morning</u>	<u>Evening</u>	<u>Total Daily</u>	<u>Sunday/Weekend</u>
Number of newspapers	28	86	111	22
Circulation (millions)	3.0	2.4	5.4	3.3

(Three all-day newspapers counted both in AM & PM columns, but only once in the total. Circulation for these papers is equally divided between AMs and PMs.)

How Much Do People Spend to Read Daily and Sunday Newspapers?
1985 Estimate of Annual Expenditures in the United States
(in billions of dollars)

<u>Weekday</u>	<u>Sunday</u>	<u>Total</u>
\$5.23	\$2.43	\$7.66

Sources: SRDS, Editor and Publisher Yearbook; ABC; CARD.
Prepared by Newspaper Advertising Bureau, Inc.

Readers-per-Copy Estimates for Total U.S.

	<u>Weekday</u>	<u>Sunday/Weekend</u>
<u>Adults</u>	<u>2.12</u>	<u>2.12</u>
Men	1.07	1.02
Women	1.05	1.10

Sources: Estimate by Newspaper Advertising Bureau, based on 1986 SMRB Study of Media & Markets; Editor and Publisher Yearbook, 1986.

Weekday Newspaper Readers-per-Copy in Top 25 ADIs

<u>Total: Top 25 ADIs</u>	<u>2.77</u>
Markets 1 - 5	2.93
Markets 6 - 10	2.64
Markets 11 - 25	2.64

Source: Simmons-Scarborough Syndicated Research Associates, 1985.

Average Weekday Coverage of Professionals and Managers

	<u>Total U.S.</u> (in millions)	<u>Daily Readers</u> (in millions)	<u>Percent of Total</u>
<u>Total professionals & managers</u>	<u>26.8</u>	<u>19.9</u>	<u>75%</u>
Individual employment income of \$35,000 & over	8.2	6.6	81%
College graduate	17.3	13.5	78%
Involved in desk top computer purchase decisions	2.5	1.9	76%
Manage or influence investments of institutional or corporate funds	1.6	1.2	80%

Source: 1986 SMRB Study of Media & Markets.

The size of the daily audience varies little over the five weekdays...

Index of Daily Newspaper Readership by Adults

	<u>Average Weekday</u>	<u>Monday</u>	<u>Tuesday</u>	<u>Wednesday</u>	<u>Thursday</u>	<u>Friday</u>
Total adults	100	98	100	102	100	101
Men	101	99	101	102	102	100
Women	99	97	98	102	98	101

Source, Audits & Surveys, Inc, 1982.

...mainly because most newspaper readers are subscribers.

How Daily Newspapers Read Yesterday Were Obtained

	<u>Weekday</u>	<u>Sunday</u>
Subscribe, delivery	70%	63%
Bought single copy	20	31
Family member brought home	2	2
Obtained otherwise	8	4

Source: Response Analysis Corporation, 1986.

And newspaper reach is virtually constant throughout the year.

Index of Month-by-Month Circulation

	<u>J</u>	<u>F</u>	<u>M</u>	<u>A</u>	<u>M</u>	<u>J</u>	<u>J</u>	<u>A</u>	<u>S</u>	<u>O</u>	<u>N</u>	<u>D</u>
AM	101	101	101	101	100	99	97	98	99	101	101	100
PM	99	100	100	100	100	100	99	99	100	101	101	101
Sun/wknd	100	101	101	101	100	99	98	98	100	101	101	100

* Average month circulation = 100.

Source: Media General, Inc, survey of IQMA members. Data cover the years 1976-1980 and are weighted by circulation size and geographic region to represent national totals.

Creativity in Newspaper Advertising

Creativity is the vital ingredient for success in any advertising medium. An extensive analysis of readership scores for newspaper ads shows that the Starch Noted scores for two ads of the same size and product category can vary by ratios of two to one.

"Objective" ad characteristics such as typeface, the presence of a package illustration, or the position of the headline, account for only small differences in attention value and interest, and formulas that recommend using overworked headline words like "new" cannot guarantee high readership.¹

The use of very general principles can be helpful: Keep the layout uncluttered. Suit the artwork to the newspaper medium. Use illustration and headline to communicate product benefits. However, general principles have limited value if the creative spark is missing.

The Creative Newspaper, available through NAB's members, reproduces outstanding creative efforts in every advertising category, and shows how progressive advertisers are taking advantage of the newspaper's new color capabilities and improved reproduction.

1) For further details, see: Research Facts on Position, Timing and Creativity; also, Creative Variables and Ad Readership, Newspaper Advertising Bureau.

Estimating Ad Readership

Page opening is the accepted measure of opportunity for advertising exposure. Other measures, such as Starch "Noted" scores, are also widely used as indications of a specific ad's attention value. It is well known that any such measure varies with the nature of the advertised product, size of ad and creative treatment.

Only a readership survey can provide reliable clues to a specific ad's attention value, but in the absence of a survey, average reported readership for a large number of ads may be useful. Average reported readership figures also provide a useful benchmark for evaluating the performance of individual measured ads.

Percent of Ads Read on Opened Pages (by size of ad)

Less than one-quarter page	12%
One-quarter to less than half page	17%
Half to less than full page	25%
Full page or more	44%

Source: Audits & Surveys, Inc, 1982. (Unweighted base is 16,605 ads of five column inches or more appearing on randomly selected sample pages of newspapers read "yesterday". For more details, see Newspaper Pages, Ads and Readers, Newspaper Advertising Bureau, 1984.)

Ad readership varies little whether the ad appears on the left or right side of the page...

	<u>Left</u>	<u>Right</u>
Men	99	102
Women	100	100

...above or below the fold...

	<u>Above Fold</u>	<u>Below Fold</u>
Men	99	101
Women	100	100

...or in the gutter or outside position.

	<u>Gutter</u>	<u>Outside</u>
Men	100	101
Women	101	100

But...editorial environment can affect performance.

Advertisements for Products of Interest to Both Men and Women

<u>Type of Page:</u>	<u>Men</u>	<u>Women</u>
Sports	114	49
Food, home	63	101
General news	100	101

NOTE: Index - Starch "Noted" score for average ad = 100.

Source: 1964 Starch studies of 33,000 newspaper ads. For more details, see Research Facts on Position, Timing and Creativity, Newspaper Advertising Bureau, 1966.

Multiple Insertions: How Advertising Exposure Accumulates

Attempting to obtain direct measures of the number of people reached by multiple ad insertions is impractical, whatever the medium. However, if it can be assumed that the likelihood of newspaper readers seeing one or more ads in a campaign is approximately the same as the likelihood of seeing one or more in a single newspaper issue with the same total number of insertions, then it is possible to estimate the cumulative effect of multiple insertions.

The first step is to establish the average exposure level for a single insertion, either through custom research or by the use of an estimate. Given this base figure, it can be assumed that multiple insertions will build along the lines shown in the following table.

Estimated Net Reach and Frequency for Multiple Ad Insertions

Average for Single Insertion:	Number of Ads in Campaign:					
	Two	Three	Four	Five	Six	Seven
<u>20%</u> net reach:*	30%	38%	45%	50%	55%	58%
avg. freq:	1.3	1.6	1.8	2.0	2.2	2.4
<u>25%</u> net reach:	37%	46%	53%	59%	63%	66%
avg. freq:	1.4	1.6	1.9	2.1	2.4	2.6
<u>30%</u> net reach:	43%	53%	61%	67%	71%	74%
avg. freq:	1.4	1.7	2.0	2.2	2.5	2.8
<u>35%</u> net reach:	50%	60%	68%	74%	78%	80%
avg. freq:	1.4	1.8	2.1	2.4	2.7	3.1
<u>40%</u> net reach:	55%	65%	73%	79%	83%	85%
avg. freq:	1.5	1.8	2.2	2.5	2.9	3.3
<u>45%</u> net reach:	60%	70%	78%	84%	87%	89%
	1.5	1.9	2.3	2.7	3.1	3.5

* Net reach = percent of exposed audience reached one or more times.

Source: "Yardstick of Accumulative Newspaper Ad Readership"

Newspaper Advertising Expenditures*
(billions of dollars)

	<u>National</u>	<u>Retail</u>	<u>Classified</u>	<u>Total</u>
1977	\$1.5	\$6.2	\$3.0	\$10.7
1979	1.8	7.8	4.2	13.9
1981	2.3	9.7	4.6	16.5
1983	2.7	11.8	6.0	20.6
1984	3.1	12.8	7.7	23.5
1985	3.4	13.4	8.4	25.2

* Production costs included.

Source: McCann-Erickson, Inc; NAB estimates for classified.

Newspaper Insert Advertising Volume

	<u>Free-Standing Inserts</u> <u>(Card & Multi-Page)</u> (billions)	<u>Free-Standing</u> <u>Insert Revenue**</u> (billions)
1977	20.1	\$1.1
1979	27.1	1.8
1981	28.7	2.3
1983	35.7	3.1
1984	41.3	3.7
1985	45.4	4.2

** Printing costs included.

Estimated Tabloid (10 3/4" x 13") Insert Costs
For All Sunday Newspapers Published Within PMSA

<u>PMSA</u> <u>(Top)</u>	<u>Number of</u> <u>Newspapers</u>	<u>Circulation</u> <u>in Millions</u>	<u>Cost per 1,000</u>				
			<u>2 Pages</u>	<u>4 Pages</u>	<u>8 Pages</u>	<u>12 Pages</u>	<u>16 Pages</u>
10	46	15.5	36.76	37.34	43.35	48.85	53.07
25	107	23.9	36.80	37.44	43.37	49.04	53.31
50	167	33.5	36.33	37.75	43.50	49.14	53.48
75	221	39.2	36.85	38.26	43.69	49.27	53.64
100	259	42.6	36.86	38.27	43.78	49.34	53.75
150	327	47.5	36.89	38.42	44.10	49.52	54.06
200	387	50.7	36.93	38.58	44.37	49.70	54.19
250	431	52.4	37.01	38.80	44.61	49.97	54.37
315	493	54.4	37.22	39.08	44.86	50.19	54.54

Sources: Circulation '86/87; individual newspapers;
Newspaper Advertising Bureau.

ROP Color: Availability and Premiums

The great majority of newspapers offer ROP color advertising. In the 317 MSA markets, SAUTM quarter-page ads in BW&1C can reach 68% of the total weekday circulation. Full-page ads in BW&3C can reach 89% of the total circulation.

Cumulative Percent of Total Circulation Represented
by Daily Newspapers Offering ROP Color^a

	<u>Accept SAU Quarter-Page Ad</u>			<u>Accept SAU Full-Page Ad</u>		
	<u>One Color</u>	<u>Two Colors</u>	<u>Full Color</u>	<u>One Color</u>	<u>Two Colors</u>	<u>Full Color</u>
Top 50 MSAs	58.8%	50.9%	49.2%	91.4%	86.1%	83.1%
Top 100 MSAs	62.3	53.8	52.0	93.4	88.5	85.9
Top 200 MSAs	66.5	59.3	57.8	94.5	90.4	88.2
All 317 MSAs	68.2	61.6	60.2	95.0	91.2	89.2

a) All daily newspapers with at least .05 ratio of circulation to households, or more than 25,000 circulation in the MSA.

Percent Color Premium Above Black and White Cost

<u>MSA Rank</u>	<u>SAU Quarter Page</u>			<u>SAU Full Page</u>		
	<u>One Color</u>	<u>Two Colors</u>	<u>Full Color</u>	<u>One Color</u>	<u>Two Colors</u>	<u>Full Color</u>
1 - 100	41%	55%	65%	12%	17%	20%
101 - 200	47	68	85	13	18	22
201 - 317	47	71	94	12	18	24
Total 317	43%	60%	74%	12%	17%	21%

Sources: ANM Circulation '83/'84; SRDS, July 1984.
Prepared by Newspaper Advertising Bureau.

TOTAL U.S. ADVERTISING VOLUME
(Billions of dollars)

Medium:	1983		1984		1985 (r)	
	Billions	% Share	Billions	% Share	Billions	% Share
Newspapers total	\$20.6	27.1%	\$23.5	26.8%	\$25.2	26.6%
national	2.7	3.6	3.1	3.5	3.4	3.5
local	17.8	23.5	20.4	23.3	21.8	23.0
Magazines total	\$ 4.2	5.6%	\$ 4.9	5.6%	\$ 5.2	5.4%
weeklies	1.9	2.5	2.2	2.5	2.3	2.4
women's	1.1	1.4	1.2	1.4	1.3	1.4
monthlies	1.3	1.7	1.5	1.7	1.6	1.7
Farm Publications	\$ 0.2	0.2%	\$ 0.2	0.2%	\$ 0.2	0.2%
Television total	\$16.5	21.8%	\$19.7	22.4%	\$20.8	21.9%
network	7.0	9.3	8.5	9.7	8.3	8.7
spot	4.8	6.4	5.5	6.2	6.0	6.3
cable (national)	0.3	0.4	0.5	0.6	0.6	0.7
local	4.3	5.7	5.1	5.8	5.7	6.0
cable (local)	0.1	0.1	0.1	0.1	0.1	0.1
Radio total	\$ 5.2	6.9%	\$ 5.8	6.6%	\$ 6.5	6.8%
network	0.3	0.4	0.3	0.4	0.4	0.4
spot	1.0	1.4	1.2	1.4	1.3	1.4
local	3.9	5.1	4.3	4.9	\$ 4.8	5.1
Direct Mail	\$11.8	15.6%	\$13.8	15.7%	\$15.5	16.4%
Business Papers	\$ 2.0	2.6%	\$ 2.3	2.6%	\$ 2.4	2.5%
Outdoor total	\$ 0.8	1.0%	\$ 0.9	1.0%	\$ 0.9	1.0%
national	0.5	0.7	0.6	0.6	0.6	0.6
local	0.3	0.4	0.3	0.4	0.3	0.4
Miscellaneous total	\$14.3	18.8%	\$16.8	19.1%	\$18.2	19.2%
national	7.3	9.7	8.8	10.1	9.6	10.1
local	7.0	9.2	7.9	9.0	8.6	9.1
Total National	\$42.5	56.1%	\$49.7	56.6%	\$53.4	56.3%
Total Local	\$33.3	43.9%	\$38.1	43.4%	\$41.4	43.7%
GRAND TOTAL	\$75.9	100.0%	\$87.8	100.0%	\$94.8	100.0%

(r): Revised.

Estimates include all costs: time & talent, space & production.
Sources: McCann-Erickson, Inc; Newspaper Advertising Bureau.
Prepared by Research Department, (212) 704-4558.

Newspapers continue to be the number-one medium for coupons.

Distribution Pattern of Manufacturers' Cents-Off Coupons

	<u>1986</u>	<u>1985</u>	<u>1984</u>
<u>Newspapers</u>	<u>83.7%</u>	<u>82.2%</u>	<u>82.1%</u>
ROP Solo	7.4	12.2	17.3
Co-op (All)	7.1	8.0	10.0
Free-Standing Insert	68.0	59.9	51.5
Sunday Magazine	1.2	2.1	3.3
Magazines	6.5	8.6	8.5
Direct Mail	4.0	4.4	4.4
In/On Package	5.8	4.8	5.0

Source: Manufacturers Coupon Control Center, 1987.

MC3 also reports that consumer use of coupons surged in 1986. In all, consumers redeemed 7.32 billion manufacturer coupons this past year, based on industry estimates developed by Manufacturers Coupon Control Center. This reflects a 13% increase over the 6.49 billion coupons redeemed in 1985. In the last four years, redemption of coupons increased by 63%, rising from 4.48 billion in 1982 to 7.32 billion during this latest year.

Using coupons, consumers saved a total of \$2.75 billion on their shopping bills in 1986.

Food Shopping

The homemakers who spend the most on groceries are the best newspaper readers.

Amount Spent in Average Week:	Coverage	
	<u>Average Weekday</u>	<u>Average Sunday</u>
\$40 or less	56½	56½
\$41 - \$70	62	65
\$71 or more	65	69

About one third of those doing major food shopping within the past four weeks favor "no particular day" of the week. 46½ do their major food shopping of Thursday, Friday or Saturday.

Major Food Shopping - Day of Week Usually Shop

	<u>Adults</u>	<u>Men</u>	<u>Women</u>
Monday	4½	3½	5½
Tuesday	4	4	4
Wednesday	7	7	6
Thursday	10	9	10
Friday	18	18	19
Saturday	18	18	19
Sunday	4	4	4
No particular day	35	37	33
Projected totals (in millions)	(124.4)	(48.6)	(75.8)

Source: Simmons Market Research Bureau,
1986 Study of Media & Markets.

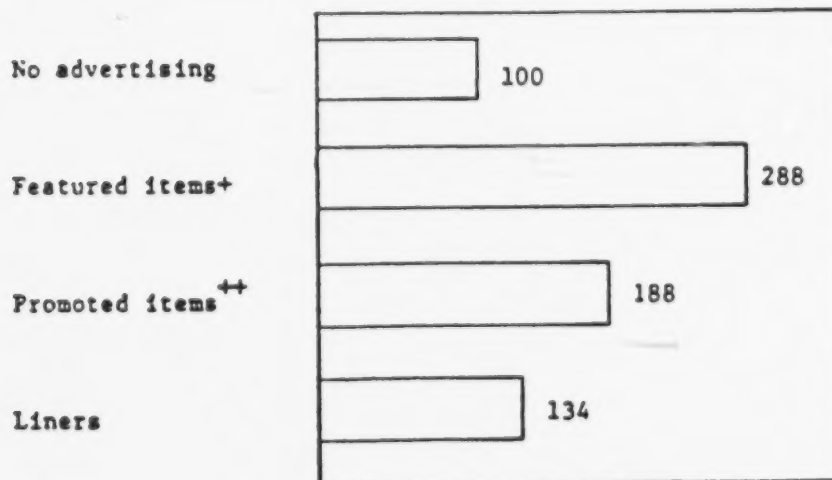
How Newspaper Advertising Affects Package Goods Sales

In 1980, computerized scanner records were used to analyze the effect of ad linage and price cuts on product movement. The analysis covered 479 items appearing in 20 ads from 17 stores. Unit and dollar sales were recorded for the week of the ad and two weeks before the ad (the base period).

Results show that, on average, newspaper advertising triples the volume of items advertised at cut prices. The sales effectiveness of newspaper ads doesn't depend on price cuts--advertising goods at regular prices doubles sales.

The movement of items advertised at regular prices is closely tied to the amount of advertising space given an item.

Sales Results For Items Advertised At Regular Prices



⁺Four square inches or more.

⁺⁺Larger than a liner but less than four square inches.

Retail Shopping

Percent of This Week's Purchases Not Planned Last Week

	<u>Percent Unplanned</u>
Women's wear (average, all items)	86½
Men's wear	82
Children's, infants' wear	85
Stationery, gift items	76
Major appliances, TV, stereo	88
Furniture, furnishings	79
Household textiles, sewing items	85
Housewares and supplies	95
Sporting goods	85

Advertising Influence on Last Unplanned Purchase

	<u>Saw or Heard Advertising</u>	<u>Source of Advertising</u>
Total reporting unplanned purchase	41½	- 100½*
Newspaper		60½
Television		17
Direct Mail		15
Magazine		6
Radio		5
Something left at door		3
No answer		1

* Total exceeds 100% because of multiple answers.

Source: Response Analysis Corporation, 1982.

(For more details, see How America Shops and Buys,
Newspaper Advertising Bureau, 1983.)

For men, the most popular day for general merchandise shopping is Saturday. For women, it's "no special day".

Day of Week Main Shopping Likely to Occur
(Women)

	<u>Toiletries, Drugs</u>	<u>Clothing</u>	<u>Sheets, Towels, etc</u>	<u>Appliances</u>	<u>New Car</u>
Monday.....	7½	6½	5½	5½	6½
Tuesday.....	5	4	3	3	2
Wednesday.....	9	7	6	3	4
Thursday.....	15	5	5	3	4
Friday.....	20	11	9	6	8
Saturday.....	16	34	32	33	27
Sunday.....	2	2	3	3	3
No special day.....	25	31	35	43	45

(Men)

	<u>Clothing</u>	<u>Appliances</u>	<u>New Car</u>
Monday.....	5½	5½	8½
Tuesday.....	4	4	2
Wednesday.....	6	5	4
Thursday.....	5	4	4
Friday.....	16	12	10
Saturday.....	42	42	39
Sunday.....	2	2	4
No special day.....	19	26	29

Source: R. H. Bruskin Associates, The Bruskin Report, #128, October 1984.

Most Believable Advertising Medium

	<u>Percent Selecting</u>
Newspaper	48%
Television	21
Direct mail	8
Magazines	8
Radio	4
All media equally believable	5
No answer	6

Source: Henry Senft Research Associates, Inc., 1986

The Selling Power of ROP Color

Advertisers know that color increases the effectiveness of their ads. Color attracts attention, generates excitement and enhances the appeal of advertising.

A 1985 split-run study¹ by four newspapers testing 12 ads showed that the color ads outsold the same ads in black and white by 42%.

1) For further details, see The Selling Power of ROP Color, Newspaper Advertising Bureau, 1986.

Consumers in the Classified Marketplace

The classified pages of daily and Sunday newspapers constitute a massive marketplace. Even when Americans aren't actively looking for a car, a job or a home, many try to keep up with ongoing trends in these three vital areas of living:

Percent of Adults Who Try to Keep up with Trends

In car models, prices, etc.	33%
In the job market, salaries, etc.	37%
In real estate, housing prices, etc.	41%

For keeping up with automotive, employment and real estate trends, the main sources of information are the daily and Sunday newspaper, especially the classified pages:

Main Source of Information on Trends

	<u>Automotive</u>	<u>Employment</u>	<u>Real Estate</u>
Classified ads, daily or Sunday newspaper	59%	59%	63%
Friends, relatives, coworkers	17	35	28
Television, TV	18	9	3
Magazines	11	10	5
Weekly newspapers, classified	5	4	7
Radio	2	3	1
Car dealers, lots	12	NA	NA
Union, trade association	NA	6	NA
All other mentions	11	13	20
Base: Those who like to keep up with trends	(382)	(435)	(465)

Source: Response Analysis Corporation, 1986.

Advertising-to-Sales Ratios for
Selected Retail Stores and Services (1985)

	<u>Ad Dollars as</u> <u>Percent of Sales</u>
Amusement & recreation services (misc)	4.7%
Apparel & accessories stores	2.5
Auto dealers & gas stations	1.6
Automotive repair & service	3.4
Computer programs & software	2.8
Computer stores	2.9
Data processing services	1.4
Department stores	3.5
Drug & proprietary stores	1.4
Eating places	3.7
Educational services	4.1
Equipment rental & leasing	2.5
Finance services	2.5
Furniture stores	5.8
Grocery stores	1.4
Hospitals	3.2
Hotels, motels	3.5
Household appliance stores	5.7
Jewelry stores	6.2
Lumber & building materials	2.7
Mobile home dealers	1.3
Motion picture theaters	4.1
Personal credit institutions	1.6
Personal services	7.5
Photofinishing laboratories	4.7
Radio & TV broadcasters	3.8
Radio, TV & music stores	4.6
Shoe stores	2.2
Variety stores	2.4
Women's ready to wear	2.9

Source: Pansophic Systems, Inc, as reported in
Advertising Age, September 15, 1986.

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THE HOME IMPROVEMENT MARKET

*Consumer Experiences
and Expectations*



Newspaper Advertising Bureau, Inc.

1180 Avenue of the Americas

New York, New York 10036

212 921 5080

THE HOME IMPROVEMENT MARKET:
Consumer Experiences and Expectations

This is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper business and its advertisers.

The study was directed and the report written by Nicolas A. Bloom and Albert E. Gollin of the Research Department.

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HIGHLIGHTS

A nationwide survey of American adults in May 1987 on home improvement activities and plans revealed the following:

1. Three-tenths (29%) of American households undertook a home improvement project in the past 12 months and 27 percent plan to do a project within the next 12 months. Thirteen percent of all households both did some home improvement work in the past year and plan a project for the next year.
2. The prime newspaper reading audience segments -- people between the ages of 35 and 49, with \$30,000-plus incomes, in households with two or more workers, and homeowners -- were all more likely to have done a home improvement project within the past 12 months and to plan to undertake this work in the next year.
3. One-third (36%) of those who engaged in home improvement projects in the past year did general projects, such as a major remodeling, and three-fourths (75%) did partial projects. Three-fifths (62%) of people who undertook home improvements in the past year did the work themselves, and 24 percent hired a contractor. Some did both, depending upon the scope of the project.

4. About one-fourth (24%) of households which did home improvement projects in the past year spent under \$500, or between \$500 and \$2,499 (28%) in total. An additional 36 percent spent \$2,500 or more. Those who undertook partial projects or who did some of the work themselves spent less than those who did general projects or who hired a contractor.

5. Forty percent of people planning a home improvement project in the next 12 months expect to do a general project, and 70 percent expect to undertake a partial project. Plans for do-it-yourself projects and for hiring a contractor are comparable to the practices with respect to the past year's home improvement projects.

6. One-fifth (22%) of the people planning home improvement projects during the next 12 months expect to spend under \$500, and 30 percent plan to spend between \$500 and \$2,499 in total. An additional 31 percent expect to spend \$2,500 or more. People expect to spend more for general projects involving contractors than they expect to spend for smaller-scale do-it-yourself projects.

7. People who did home improvement projects and those who plan to undertake them both rated good service in general, good prices every day, helpful sales people, and a large variety and selection of products as the four most important reasons for deciding where to shop for home improvement products.

8. Those who did home improvement projects in the past year and people who plan to do them in the next year rated newspaper ads run by local stores as the single most useful source of information about home improvement products. Those who undertook do-it-yourself projects were more likely than people who hired a contractor to say that newspaper ads were a very useful source of information on home improvement products.

9. Newspapers are a constant element in the lives of active shoppers for home improvement products. People who had done some project in the past year, particularly those who spent \$500-plus in total, were more likely to be frequent daily newspaper readers and Sunday paper readers.

SECTION ONE - THE HOME IMPROVEMENT MARKET

In 1986, Americans spent \$95.4 billion dollars on home improvement projects. The estimate for 1987 is \$102.6 billion, an 8 percent increase (Source: Building Supply Home Centers, May 1987).

Clearly, this is a huge market. The home improvement market consists of many millions of decisions: deciding to do a home improvement project; choosing sources of information about projects, stores, and products; selecting the types and brands of products; where to shop; and where to buy the necessary products or services. This report seeks to define aspects of this market by drawing upon the experiences and expectations of consumers.

The findings in this report come from a survey conducted in May 1987 with 1,019 adults, who were sampled in R. H. Bruskin's weekly OmniTel survey. All respondents were asked about their past year's activities, plans for home improvement projects, attitudes toward various shopping outlets, and sources of information.